Human Resources Administration
Department of Social Services

OFFICE OF POLICY, PROCEDURES, AND TRAINING

POLICY BULLETIN #22-31-SYS

ANGIE RELEASE 2 NOTES AND SPOS RELEASE NOTES VERSION 4.2

Date: May 25, 2022	**Subtopic(s):** POS; SNAP
	Purpose: This policy bulletin is to inform Non-Cash Assistance SNAP Center staff as well as Mailer, Match and Action Program (MMAP) staff, that the latest version of the Activity and General Information Exchange (**ANGIE**) will migrate into production on June 13, 2022. Descriptions of the changes can be found in the Overview Document for ANGIE (**Attachment A**), Eligibility Specialist Role ANGIE Release 2 Notes (**Attachment B**), Supervisor Role ANGIE Release 2 Notes (**Attachment C**), Manager Role ANGIE Release 2 Notes (**Attachment D**), Regional Manager and Business Administrator Roles ANGIE Release 2 Notes (**Attachment E**), Reports ANGIE Release 2 Notes (**Attachment F**), Glossary Document for ANGIE Release 2 Notes (**Attachment G**), SPOS Release Notes Version 4.2 (**Attachment H**), and SPOS Release Notes Version 4.2 (**Attachment I**). The ANGIE pilot migrates into production on June 13, 2022 at Supplemental Nutrition Assistance Program (SNAP) Telephone Interview Processing Services (TIPS) 24 (S24) and Mailer and Match Action Program (MMAP) (S25). The citywide rollout of ANGIE migrates into production on July 11, 2022 and covers SNAP TIPS 42 (S42). These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx *Effective June 13, 2022*

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*

Distribution: X

Attachments:

Attachment A	Overview Document for ANGIE
Attachment B	Eligibility Specialist Role ANGIE Release 2 Notes
Attachment C	Supervisor Role ANGIE Release 2 Notes
Attachment D	Manager Role ANGIE Release 2 Notes
Attachment E	Regional Manager and Business Administrator Roles ANGIE Release 2 Notes
Attachment F	Reports ANGIE Release 2 Notes
Attachment G	Glossary Document for ANGIE Release 2 Notes
Attachment H	Streamlined POS Release Notes Version 4.2
Attachment I	Streamlined POS Release Notes Version 4.2

Attachment A

Overview Document for ANGIE

ANGIE Documentation

Table of Contents

1. Project Overview

The Activity and General Information Exchange (**ANGIE**) replaces the Classic POS reports, queues and action menus used to assign work to SNAP Staff. ANGIE is a workforce management and task assignment tool to achieve the following goals:

- Citywide processing, including universal processing for workers and supervisory staff, electronic case management and task assignment based on priority dates.
- Case management system modernization and integration with Streamlined POS (SPOS)
- Management strategies, including management structure, pivot staff, one touch processing, managing to in-flow versus out-flow and managing work coming due.

2. User Roles in ANGIE

ANGIE supports the following user roles:

- Eligibility Specialist (ES)
- Supervisor
- Manager
- Regional Manager & Business Administrator
- Reviewer

Role based dashboards will be displayed upon login to ANGIE.

3. Summary of Changes in Release 2 (R2)

This document also contains the details about new functionality in R2 of ANGIE, including:

- Addition of Supplemental Security Income (SSI) Center (**S15**) and Residential Treatment Center (**RTC**) (**S61**) processing.
- Addition of Mailer, Match and Action Program (MMAP).
- Updates to dashboards.
- Task prioritization and assignments for Periodic Reports.
- Task prioritization and assignments for Interim reports.
- Recertification processing updates.
- Integration for documents received for review after a case closing or denial.
- Updates to Case Search.
- Manage Configurations - Different Hold Times for “Supervisor Help” and “Help Desk Support” Reasons.
- Task Assignment Based on Skillset.
- Warning Messages on Manage Staff tab.
- New Intake list.

- New Streamlined Paperless Office System (SPOS) Intake activity.

4. S15 and S61 Processing

Processing for these centers will be added to ANGIE in R2 for the Family Independence Administration Supplemental Nutrition Assistance Program (FIA SNAP):

- FIA's SSI Center is **S15**. Cases at this center have specialized budgeting and rules that require special logic.
- FIA's RTC for SNAP (**S61**) includes special processes for RTC applications, case changes and recertification processes. Cases at this center have specialized budgeting and rules that require special logic.

5. Mailer and Match Action Program (MMAP) Processing

FIA's MMAP group will be integrated with the ANGIE system in R2. This group is responsible for processing periodic reports, mandated matches for active SNAP cases, as well as special projects such as Mass Re-Budgeting (MRB) and other such initiatives.

MMAP staff is enrolled in center **F25** with citywide access. The following roles will be integrated for MMAP:

- Eligibility Specialist
- Supervisor
- Manager
- Regional

6. Log into ANGIE

A new link named **ANGIE** will be added to the POS Portal as seen below.

- Upon selection of the link the login page will display. The login page will require the Eligibility Specialist, Supervisor, Manager, and Regional Manager to enter their Welfare Management System (WMS) ID and password, followed by the selection of their designated center.

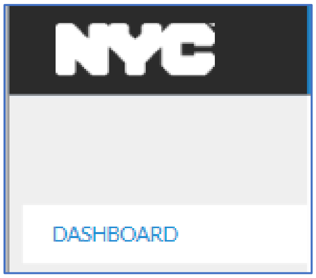
Upon successful login, the Eligibility Specialist, Supervisor, Manager, and Regional Manager will be displayed the corresponding dashboard specific to the role.

7. ANGIE Header

ANGIE header displays the system name as **ANGIE**, **Welcome message** showing the name of the respective Eligibility Specialist, Supervisor, Manager, or Regional Manager, and the **Tools menu**.

8. Left Navigation Pane

Based on the Role and the Skillsets/Permissions granted to the role, the accessible pages are displayed on the left navigation pane. The Eligibility Specialist, Supervisor, Manager, and Regional Manager can easily navigate between pages upon selection. All ANGIE roles will have a default dashboard page as the landing page upon login to ANGIE. In R2, a new **Intake** link was added in the navigation bar, which opens the new **Intake List**. This is covered in more detail in a later section.



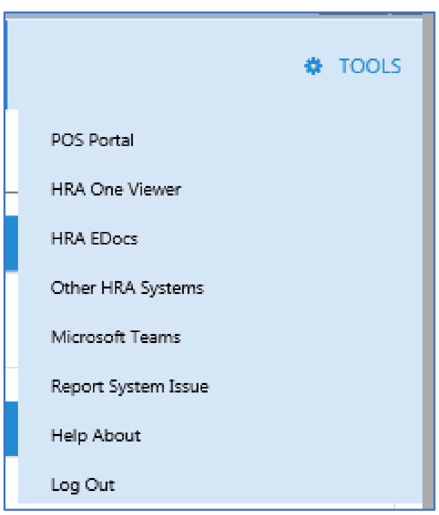
9. ANGIE Widget – Header Layout

The widget will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

- Widget Name: The name of the respective widget will be displayed.
- Last Updated: Last updated timestamp on when the data was last updated in the format: **Last Updated: mm/dd/yy hh:mm AM/PM**
- A refresh button, if applicable, to refresh the data within the widget. Consequently, the last updated timestamp will also be updated. For some widgets, there will not be a refresh icon.
- A button to minimize or maximize the widget.

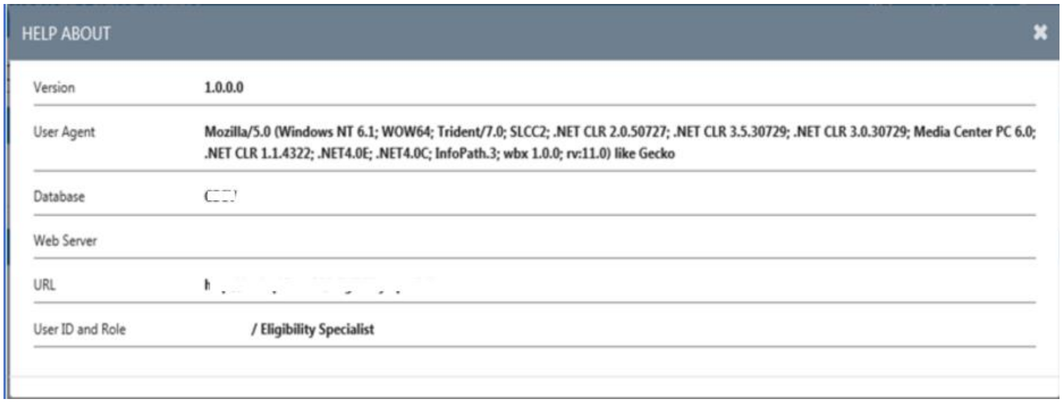
10. Tools Menu

ANGIE has a **Tools** menu that includes links to the Paperless Office System (POS) Portal, Human Resources Administration (HRA) One Viewer, Department Social Services (DSS) eDocs, Other HRA Systems, Microsoft Teams, Report System Issue, Help About and Log Out.



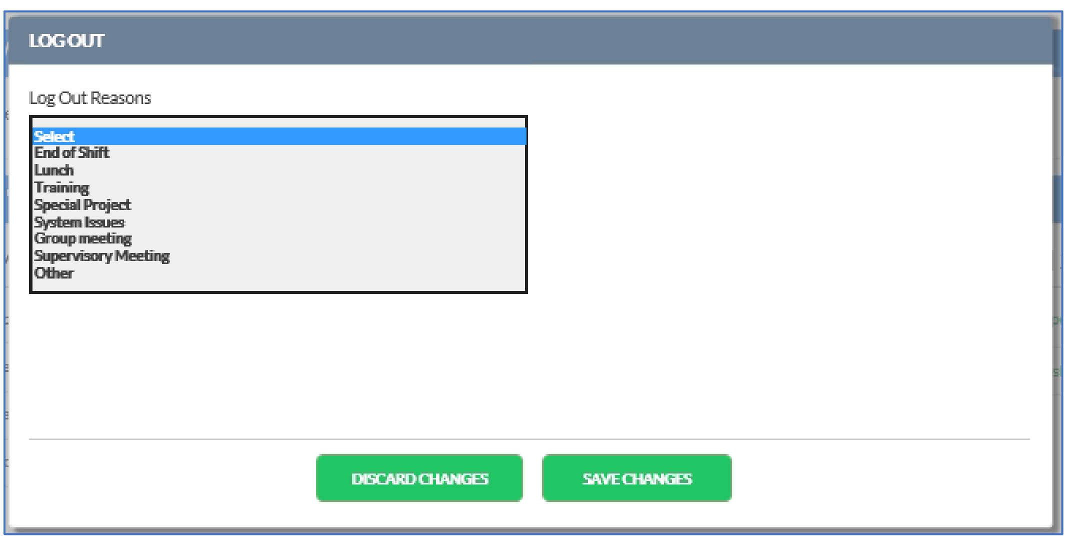
11. Help About

- From the **Tools** menu, selecting the Help About option will provide additional technical information to the respective Eligibility Specialist, Supervisor, Manager, or Regional Manager, when reporting system issues. This includes the Version, User Agent, Database Web Server, URL, User ID and Role.

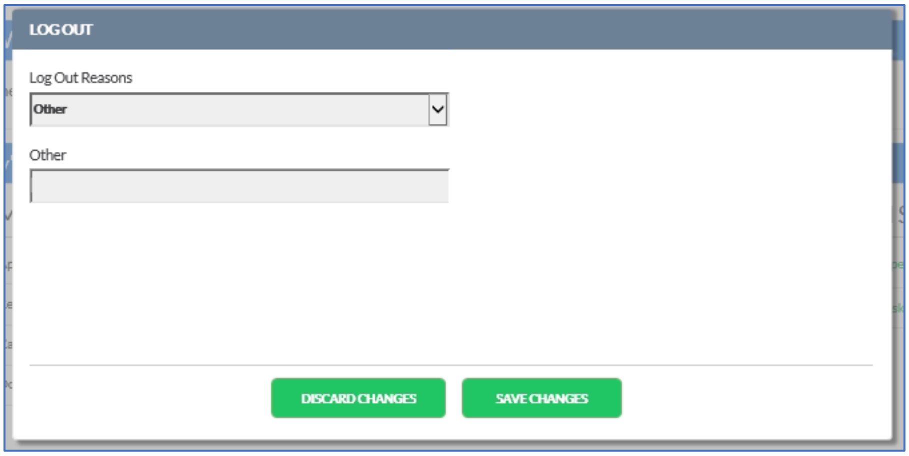


12. Log Out from ANGIE

- To log out from ANGIE, the Eligibility Specialist, Supervisor, Manager, and Regional Manager are required to select the Log Out option from the **Tools** menu. Upon selection, a modal window with the list of available Log out Reasons will be displayed. Log out reasons include End of Shift, Lunch, Training, Special Project, System Issues, Group Meeting, Supervisory Meeting, and Other.



- If **Other** is selected**,** the Eligibility Specialist, Supervisor, Manager, and Regional Manager roles must manually enter the specific reason within the **Other** field.
- Selecting **Save Changes** will successfully log out of ANGIE.



Users are logged out automatically after 15 minutes of inactivity, with a logout reason of **Time Out**.

13. Task Assignments in ANGIE

ANGIE logically groups the work for SNAP into types of tasks:

- Application – Cases in Applying (AP) or Single Issue (SI) status in WMS
- Recertification – Cases that must complete a recertification interview
- Case Change – Cases in Active (AC) status that submit changes
- Document Review – Cases in AC status that submit documents and do not have an open recertification or case change.
- Periodic Report – Cases in Active status (**AC**) that must complete a mandated periodic report.
- Interim Report – Cases in Active status (**AC**) at center S15 that must complete a mandated interim report.

Universal Processing
Eligibility Specialists in ANGIE will work from a shared common list of ready tasks, which will be assigned by ANGIE based on priority dates and helps prevent backlogs. This universal processing pool of work removes the need to individually access in the queue to assess the readiness of the task.

Supervisors are pulling cases for sign-off from a general pool of available cases that need signoff based on the priority, and not just their own staff. It removes the need for supervisors to continually monitor queues, re-assign cases between Workers' queues, and re-assign cases between processing queues and Worker queues.

Applications
After applications are registered in WMS, they are tracked in ANGIE on the same day. The Eligibility Specialists will use ANGIE to start the required interviews in Streamlined (SPOS) for applicants.

After the interviews and expedited Supplemental Nutrition Assistance Program (SNAP) decisions are completed, ANGIE will track the readiness for cases with deferrals for document submissions and new matches, in order to assign the tasks based on the priority and due dates.

ANGIE will also track and assign the tasks for cases without deferrals and cases that fail to keep the required application interview.

Recertifications

Monthly lists of cases due for recertification are received from WMS and will be loaded into ANGIE. ANGIE will track the submission of the online recertifications and indexing of recertification forms that make cases ready for an interview.

The Eligibility Specialists will use ANGIE to start the required interviews in SPOS for recertifications.

After the interviews are completed, ANGIE will track the readiness for cases with deferrals for document submissions and new matches, in order to assign the tasks based on the priority and due dates. ANGIE will also track and assign the tasks for cases without deferrals, based on their priority.

Case Changes

ANGIE will track the submission of the online case changes and activities started by the Eligibility Specialists for cases in AC status. ANGIE will track the readiness cases with deferrals for document submissions and new matches, in order to assign the tasks based on the priority and due dates.

Document Reviews

ANGIE will track the submission of the documents for cases in AC status which do not have an open task in ANGIE. The Eligibility Specialists will be assigned the new Document Review activity to determine whether a case change is required based on the submitted documentation.

Periodic Reports

Monthly lists of cases due for a periodic report are received from the Welfare Management System (WMS) and will be loaded into ANGIE. ANGIE will track the submission of the online periodic report and indexing of the periodic mailer forms that make cases ready for processing, in order to assign the tasks to MMAP staff based on the priority and due dates.

Interim Reports

Monthly lists of **S15** cases due for an interim report are received from WMS and will be loaded into ANGIE. ANGIE will track the indexing of the interim report forms that make cases ready for processing, in order to assign the tasks to FIA SNAP staff based on the priority and due dates.

Approvals
For approvals, ANGIE will assign the tasks to the Supervisors based on the priority and due dates. Supervisors will receive cases for approval from the universal pool of processing completed by SNAP workers, based on the priority of the task. Approvals are no longer restricted to actions received from the specific Supervisor's team in the Supervisor's POS queue.

For managers, it removes the need to continually monitor processing queues, and re-assign cases between Supervisor queues.

Holding a task
ANGIE will allow staff to hold an assigned task for a period of two hours, by selecting a reason for the hold. This allows the staff person to return to the same task that was assigned. After two hours, the hold on the task is released for assignment to the next available staff person based on priority. This is covered in greater detail in the document for each role.

Returning a task
ANGIE will allow staff to return an assigned task on which they cannot work. The staff must select a valid reason from the list for the return. This is covered in greater detail in the document for each role.

14. SPOS Activity Integration

ANGIE will allow staff to start SPOS activities. Staff will no longer need to open Classic POS to access their assigned activities:

- The ES will start their processing activities through the **Get Next Case for Processing** button, which will assign the next highest priority processing task.
- The ES will start interviews and other activities through the **Case Search.**
- The Supervisors will start their approval activities through the **Get Next Case for Sign-Off** button, which will assign the next highest priority approval task from the general pool and is no longer restricted to the supervisor's own staff.
- A new **Intake List** will be added to allow the worker to register a new SNAP case and to resume a suspended intake.
- The Managers and Regional Managers will monitor their units using dashboards and reports.
- A new SPOS activity named **Document Review** will be added to allow review of documents submitted between recertifications.
- A new **Event Log** will track activities and actions taken on a case, allowing the ES and Supervisor to view this information directly in SPOS, without needing to suspend the case action.
- Staff enrollment will be handled by managers and business administrators in a new **Manage Staff** interface.

As interviews, processing tasks and approvals are completed in SPOS, ANGIE is updated with this information and the events are recorded. As milestones are reached, the task status and priority are continuously updated.

SPOS integration is covered in more detail in the release note documents for the Eligibility Specialist, Supervisor, Manager and Regional Manager.

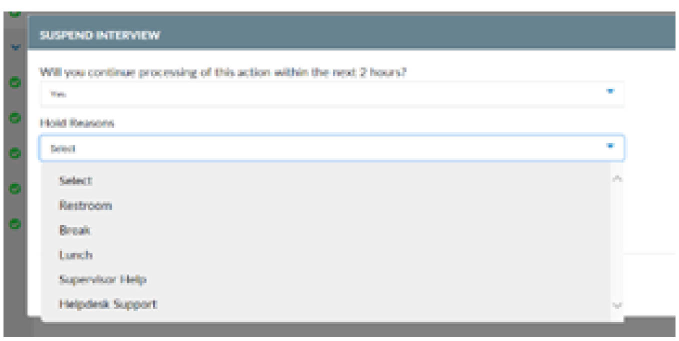
15. SPOS Suspend Reason Integration with ANGIE Hold and Return

The **Suspend Reasons** dialog box in SPOS is integrated with ANGIE when the Worker or Supervisor suspends a case.

The Worker or Supervisor selects from a list of reasons when suspending a case to document the reason for suspending a case. The dialog box has the following text and options: "**Will you continue processing of this action within the next 2 hours?** [Yes or No]."

The Worker or Supervisor indicates that they will continue the action
If the Worker or Supervisor indicates that they intend to continue processing the action in the next two hours, then SPOS displays the following hold reasons:

- Restroom
- Break
- Lunch
- Supervisor Help
- Helpdesk Support



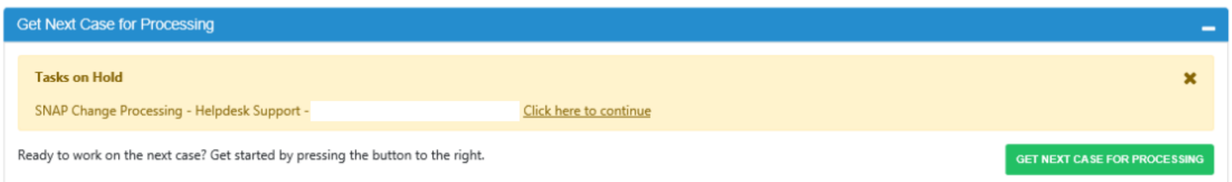
Hold for Restroom, Break or Lunch in ANGIE
When the Worker or Supervisor suspends the case and selects a hold reason of Restroom, Break or Lunch, ANGIE will hold the case for up to 2 hours:

- The Worker will click on the **Get Next Case for Processing** to return to the case. If the Worker does not return to the case, it will be available for assignment to a different Worker, based on the priority.

- The Supervisor will click on the **Get Next Case for Sign-Off** to return to the case. If the Supervisor does not return to the case, it will be available for assignment to a different Supervisor, based on the priority.

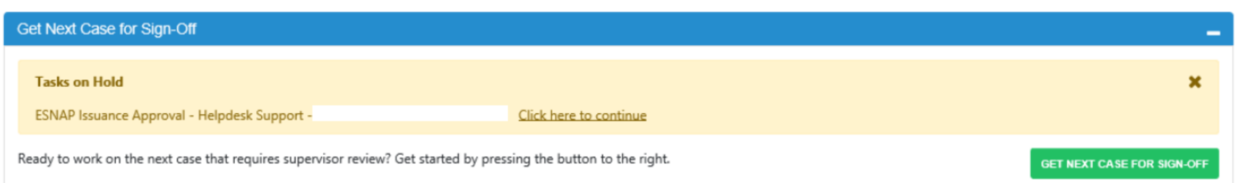
Hold for Helpdesk Support or Supervisor Help
When the Worker suspends the case and selects a hold reason of Helpdesk Support or Supervisor Help, a notification named **Tasks on Hold** will appear in the **Get Next Case for Processing** menu. This hold will be in place for up to two days, to allow for resolution of the issue encountered by the Worker.

- To continue working on the case, the Worker will click on the **Click here to continue** link, which will make the case available when the **Worker clicks Get Next Case for Processing**.



When the Supervisor suspends the approval action in SPOS and selects a hold reason of **Helpdesk Support** or **Supervisor Help**, a notification named **Tasks on Hold** will appear in the **Get Next Case for Sign-Off** menu. This hold will be in place for up to two days, to allow for resolution of the issue encountered by the Supervisor.

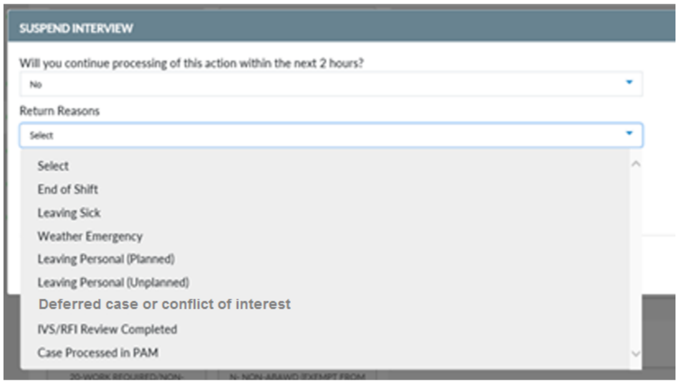
- To continue working on the case, the Supervisor will click on the **Click here to continue** link, which will make the case available when the Worker or Supervisor clicks Get Next Case for Sign-Off.



The Worker or Supervisor indicates that they will not continue the action
If the Worker or Supervisor indicates that they do not intend to continue processing the action within two hours, then SPOS displays the following return reasons:

- End of Shift
- Leaving Sick
- Weather Emergency
- Leaving Personal (Planned)
- Leaving Personal (Unplanned)
- Deferred Case or Conflict of Interest

- IVS/RFI Review Completed
- Case Processed in PAM



When the Worker or Supervisor does not intend to return to the case, the task is returned to the virtual queue and business rules re-run to determine task readiness and priority.

Selecting a reason of Information Verification Service/Resource File Integration (**IVS/RFI**) **Completed** notifies ANGIE that the review Information Verification Service (IVS) or RFI was completed by the Worker.

Selecting a reason of **Case Processed** in the Paperless Alternate Module (**PAM**) or in Classic POS using the SNAP Regional Office (**FRO**) puts assignments for the case on hold for 5 days, to allow for processing of the manual Turnaround Document (TAD) or a TAD processed in Classic POS. If the WMS changes are processed in this timeframe, the task may be removed by ANGIE. If the WMS changes are not processed in this timeframe, the task is again loaded for assignment based on readiness and priority.

Eligibility Specialist Role

ANGIE Release 2 Notes

Table of Contents

1. Document Objective

The objective of this document is to provide context on the Eligibility Specialist role within the Activity and General Information Exchange (**ANGIE**). The layout of the ANGIE dashboard for the Eligibility Specialist allows the logical completion of the activities related to the role and consume the necessary information for the role.

2. Summary of Changes in Release 2 (R2)

This document also contains the details about new functionality in R2 of ANGIE, including:

- Addition of Supplemental Security Income (SSI) Center (**S15**) and Residential Treatment Center (**RTC**) (**S61**) processing.
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- Warning Messages on Manage Staff tab.
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Processing for these centers will be added to ANGIE in R2 for the Family Independence Administration Supplemental Nutrition Assistance Program (FIA SNAP):

- FIA’s SSI Center is **S15**. Cases at this center have specialized budgeting and rules that require special logic.
- FIA's RTC for SNAP (**S61**) includes special processes for RTC applications, case changes and recertification processes. Cases at this center have specialized budgeting and rules that require special logic.

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FIA’s MMAP group will be integrated with the ANGIE system in R2. This group is responsible for processing periodic reports, mandated matches for active SNAP cases, as well as special projects such as Mass Re-Budgeting (MRB) and other such initiatives.

MMAP staff is enrolled in center **F25** with citywide access. The following roles will be integrated for MMAP:

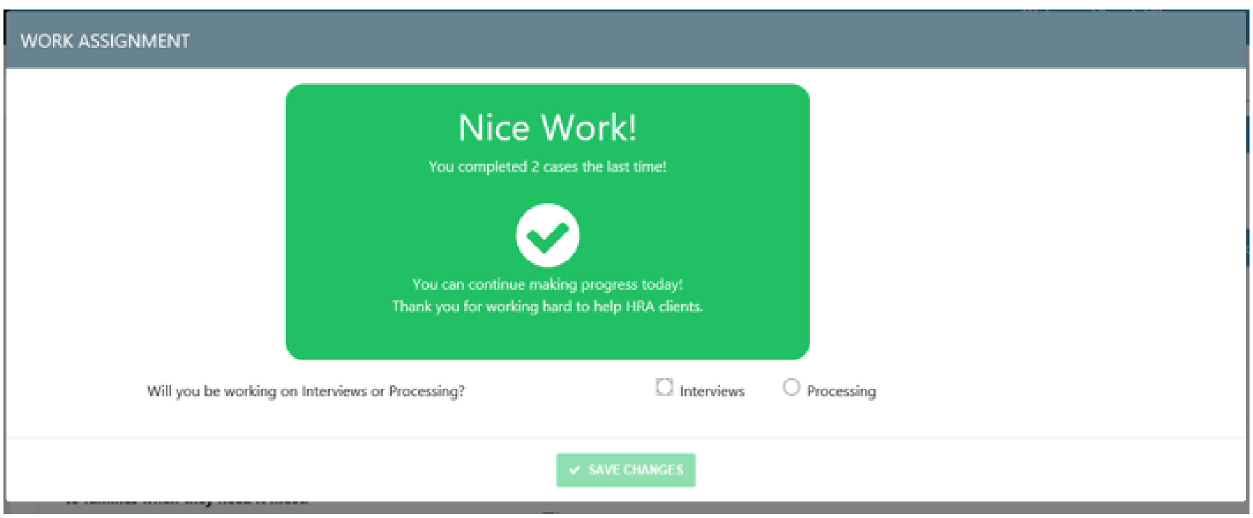
- Eligibility Specialist
- Supervisor
- Manager
- Regional

5. Home Page: Dashboard for Eligibility Specialist

Upon login, the landing screen in ANGIE is the **Dashboard** page. This screen allows the Eligibility Specialist to view their progress, access their next priority task and search for cases. It replaced the individual's Classic POS queue.

A **Work Assignment** screen appears when the ES logs into ANGIE. The ES must select whether they will be working on interviews or processing and click the **Save Changes** button.

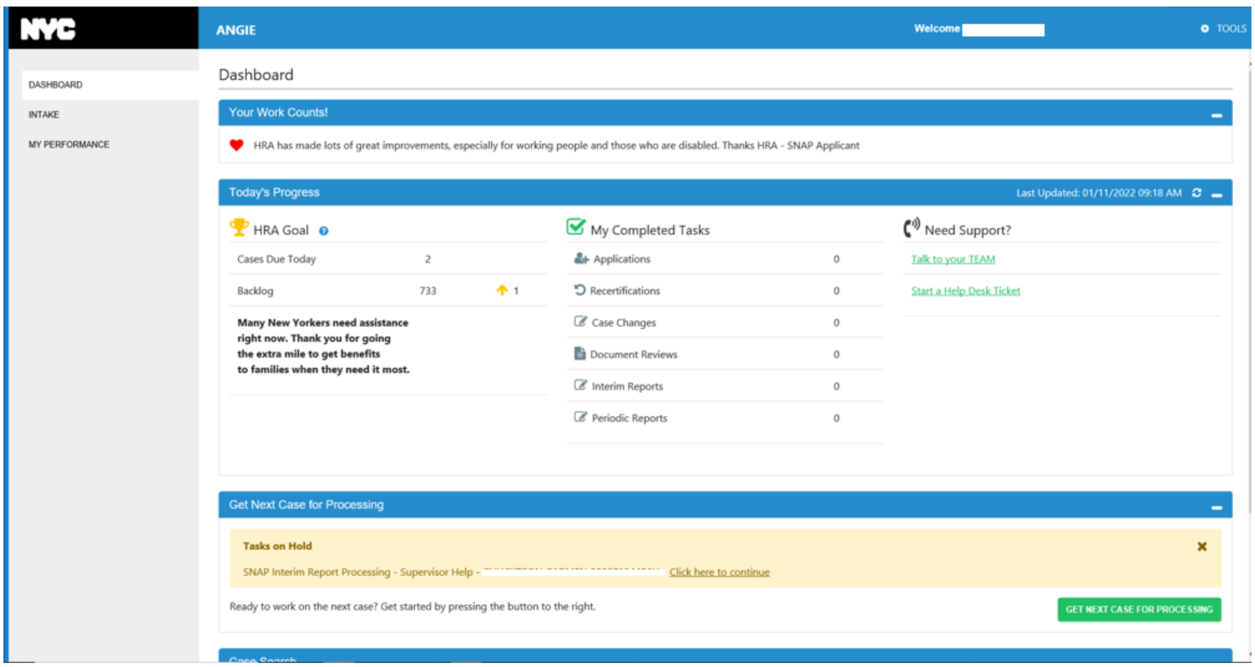
- When the ES logs into ANGIE for the first time of the day, the screen includes a message of: "Nice work! You completed *n* cases the last time! You can continue making progress today! Thank you for working hard to help HRA clients."



The **Dashboard** screen opens, which includes the navigation bar on the left-hand side, the title bar with the Eligibility Specialist's name and the **Tools** menu and the main panel with the Eligibility Specialist's function. In R2, a new **Intake** link was added in the navigation bar, which opens the new **Intake List**. This is covered in more detail in a later section.

Collapsible widgets appear in the Dashboard, showing:

- **Your Work Counts!**
- **Today's Progress**
- **Get Next Case for Processing**
- **Case Search**
- **Daily Activity Sheet**



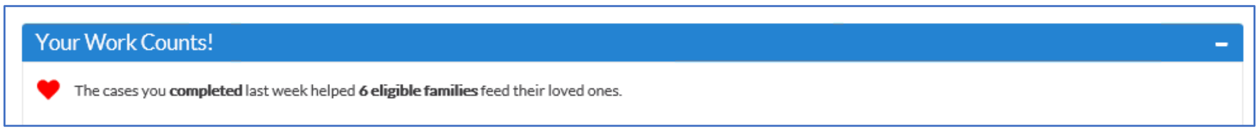
The widgets will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

- Widget Name: The name of the respective widget is displayed.
- Last Updated: Last updated timestamp on when the data was last updated in the format: Last Updated: **mm/dd/yy hh:mm AM/PM**.
- A refresh button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

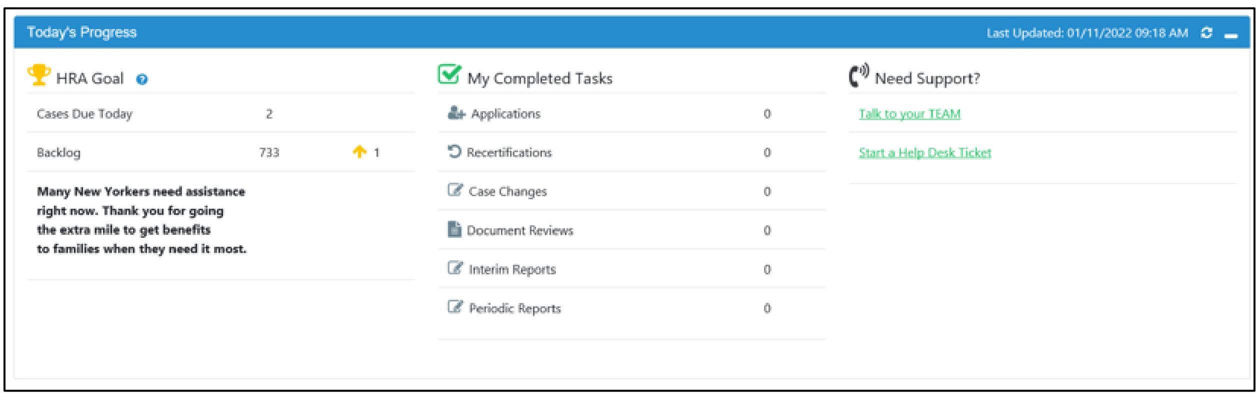
6. "Your Work Counts!" & "Today's Progress" Widgets for the Eligibility Specialist

The **Your Work Counts!** widget provides positive messages for the Eligibility Specialist, with information about how many families their work helped in the previous week (first message as seen below) and positive messages from applicants and participants. The positive messages are from applicants/participants and are pulled from reviews of the Access Human Resources Administration (AHRA) mobile app in the App Store / Google Play store and also from the AHRA site. The comments alternates between messages. The information displayed within this widget gets updated weekly.

- There is a table with all possible messages that could be displayed from the sources mentioned. This would be a static table that would get refreshed periodically with a new list.
- Each time the Eligibility Specialist logs into ANGIE or returns to ANGIE from SPOS, either the “The cases you completed last week helped X eligible families feed their loved ones.” or that day’s HRA message is displayed. Selection is random.



Today’s Progress widget for the Eligibility Specialist consists of **HRA Goal**, **My Completed Tasks**, and **Need Support** sections. This widget keeps track of the daily progress.



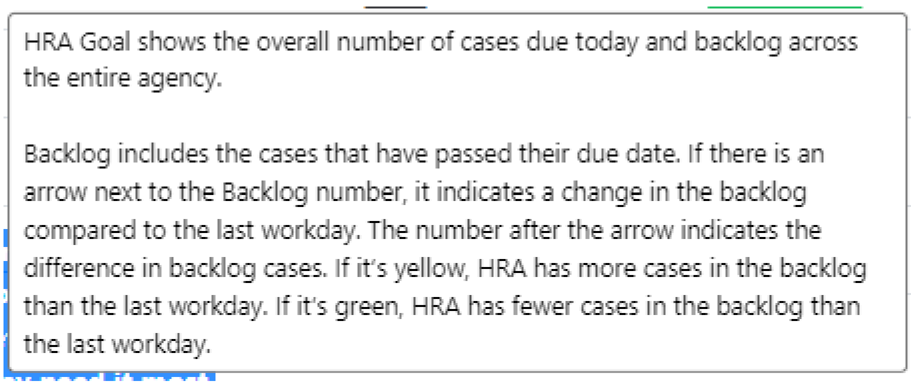
The **HRA Goal** section provides information about **Cases Due Today** and **Backlog**:

- **Cases Due Today** displays all tasks with a Priority Date of Today.
- **Backlog** is displayed as the sum of tasks that are late and overdue.
  - Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday,
  - Arrow down (displayed in green) for a decrease in the backlog since yesterday,
  - No arrow at all (just the backlog number) for no increase or decrease in the backlog number. When there are zero cases in the backlog for more than one day, the number of days that the backlog has been zero is counted.
    - ➢ This backlog comparison is comparing the start of day backlog number from yesterday to the start of day backlog number from today.
    - ➢ The backlog comparison is calculated at 5:30am each day.

- The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.

- Below the **Cases Due Today** and **Backlog**, there will be text indicating: “Many New Yorkers need assistance right now. Thank you for going the extra mile to get benefits to families when they need it most.”

HRA Goal Help Text is displayed when selecting the **HRA Goal Help** Icon as seen below:



The **My Completed Tasks** section informs the staff regarding their completed cases for the day for **Applications**, **Recertifications**, **Case Changes**, **Document Reviews**, **Periodic Reports**, and **Interim Reports**.

- Clicking on **Talk to your TEAM** opens **Microsoft Teams**.
- Clicking on **Start a Help Desk Ticket** opens the **Self-Service Incident Form** and allows the Eligibility Specialist to report any technical issues encountered in ANGIE.

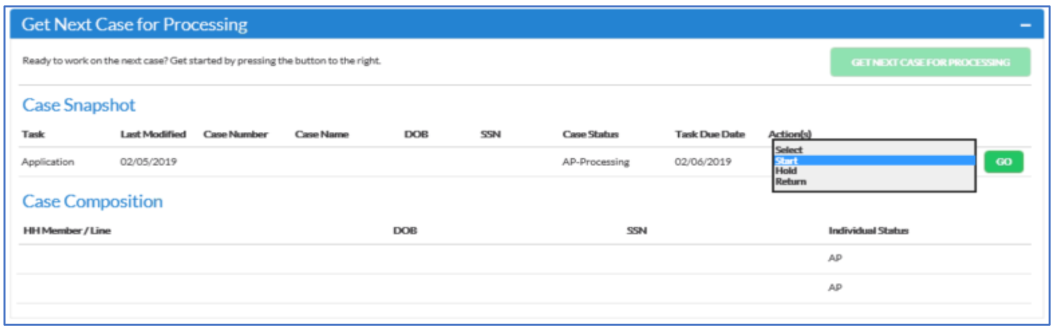
7. Get Next Case for Processing: Next Priority Task for the Eligibility Specialist

The Eligibility Specialist will get the next task to work on by selecting the **Get Next Case for Processing** button located within the dashboard. The tasks that are distributed to the Eligibility Specialist is based on the priority logic.

- Once the button is selected, the Eligibility Specialist is shown a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date**, and **Action(s)**. The columns for the

Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.

- The Eligibility Specialist is able to start the task by selecting the **Start** option within actions dropdown, and then selecting the **GO** button. The ANGIE system will then launch the Streamlined POS application for the Eligibility Specialist to work on the respective task.
- In R2, the **Task** column was updated to provide additional detail about the assigned work. For example, it will inform the Eligibility Specialist if the assigned task is an error correction.
    - Previously, it only informed the Eligibility Specialist that an application, recertification, change case or document review task was assigned.



In R2, two new task types will be added:

- Periodic Report – Cases in Active status (**AC**) that must complete a mandated periodic report.
- Interim Report – Cases in Active status (**AC**) at center S15 that must complete a mandated interim report.

Periodic Reports
Monthly lists of cases due for a periodic report are received from the Welfare Management System (WMS) and will be loaded into ANGIE. ANGIE will track the submission of the online periodic report and indexing of the periodic mailer forms that make cases ready for processing, in order to assign the tasks to MMAP staff based on the priority and due dates.

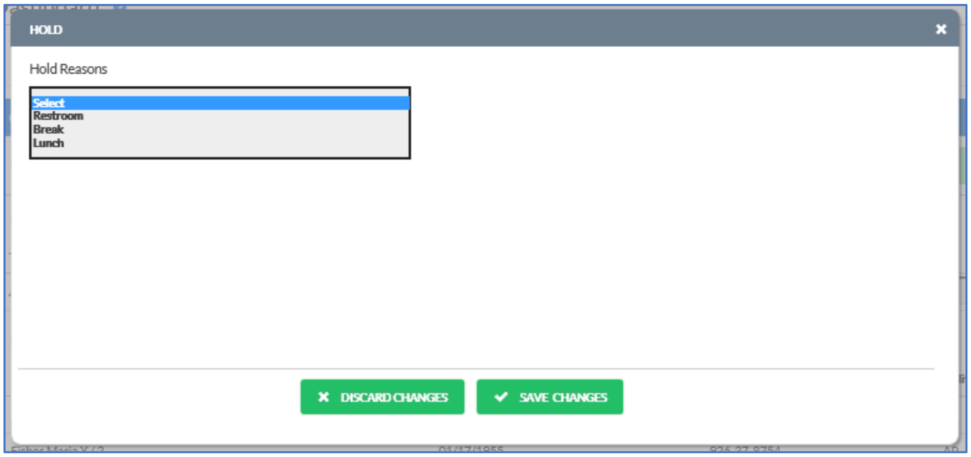
Interim Reports
Monthly lists of **S15** cases due for an interim report are received from WMS and will be loaded into ANGIE. ANGIE will track the indexing of the interim report forms that make cases ready for processing, in order to assign the tasks to FIA SNAP staff based on the priority and due dates.

8. Hold or Return Task

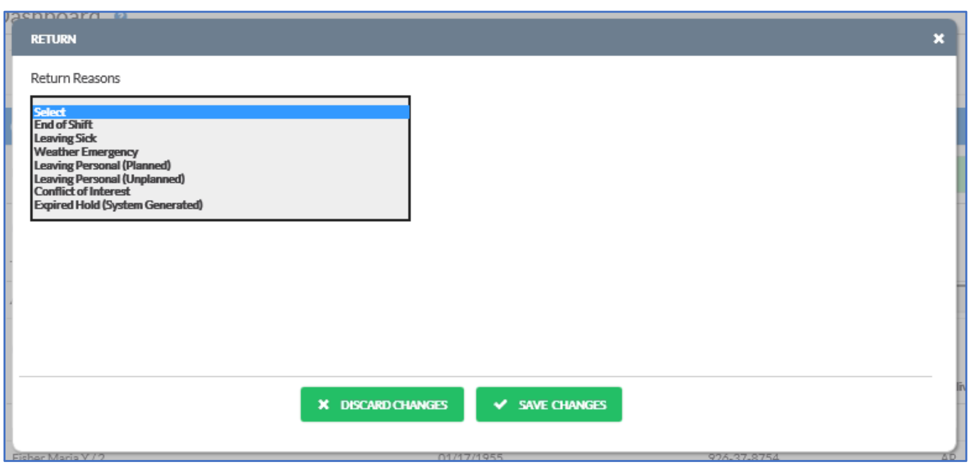
- The Eligibility Specialist can hold a task by selecting the **Hold** option from the **Action(s)** dropdown and clicking on the **Go** button. A modal window opens to select from the available **Hold Reasons** (Restroom, Break, Lunch).

- Once the Eligibility Specialist selects the applicable **Hold Reason** and then selects **Save Changes,** the hold is applied on the respective task for a set time (2 hours), for that Eligibility Specialist.

Note that the Eligibility Specialist cannot work on another “prioritized task” until the hold task is worked. If the Eligibility Specialist returns within the set time, the Eligibility Specialist is provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task is placed back in the general pool and another Eligibility Specialist may have access to that task.



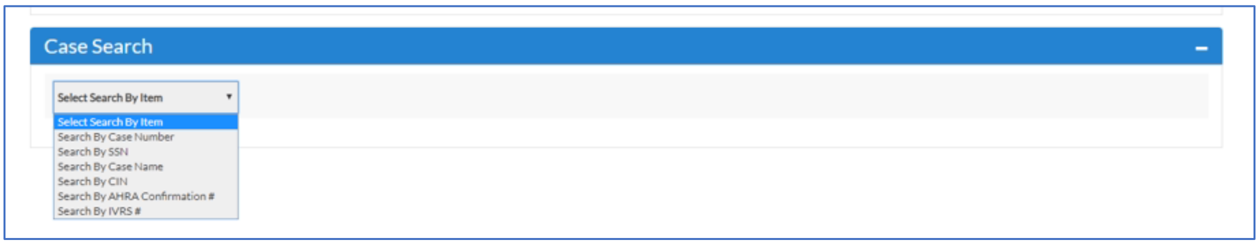
- The Eligibility Specialist can return a task by selecting the **Return** option from the Action(s) dropdown and clicking the **Go** button. A window opens to select from the available **Return Reasons** (End of Shift, Leaving Sick, Weather Emergency, Leaving Personal (Planned), Leaving Personal (Unplanned), Conflict of Interest, Expired Hold (System Generated)).
- After selecting the applicable return reason and clicking the **Save Changes** button, the task is returned to the general pool and another Eligibility Specialist can get the task.



9. Case Search: Finding Other Cases and Actions

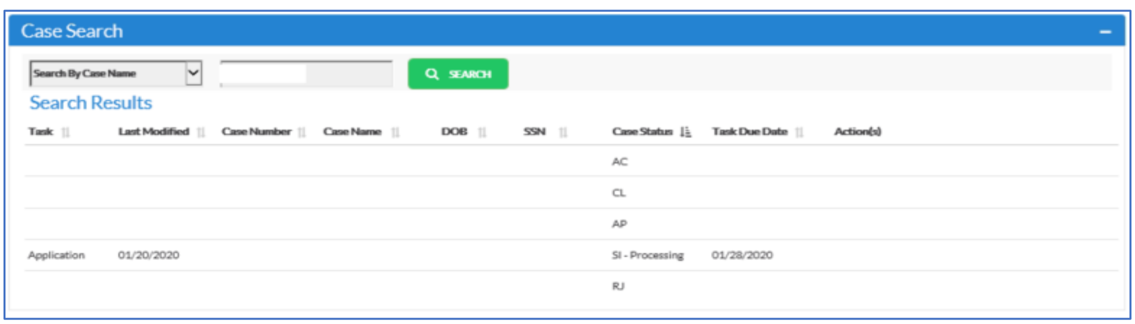
The Eligibility Specialist can search for a case based on the following criteria:

- Case Number
- SSN
- Case Name
- CIN (Client Identification Number)
- AHRA Confirmation #
- IVRS # (Interactive Voice Response System for Recertifications)



Based on the criteria selected from the dropdown, the Eligibility Specialist is required to enter the corresponding information.

- Upon selecting the **Search** button, the system will display the search results consisting of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date**, and **Action(s)**.



- Selecting the desired row will highlight that row as seen below. Once the desired row is selected, the Eligibility Specialist can select from available options from the **Action(s)** dropdown and select **Go** to execute. The options available within the **Action(s)** dropdown are dependent on the **Case Status** of the Search result. The search process can result in the following three outcomes:

(1) **Open Task**

- Cases with **open tasks** will have information in the **Task** and **Last Modified** columns of the **Search Results** section.
- If system finds a case with **open task**, it will display this case first in the **Search Results** section.

- If the system finds multiple cases with **open tasks**, it will display these cases first, sorted by earliest date in the **Task Due Date** column.

(2) **Latest Task**

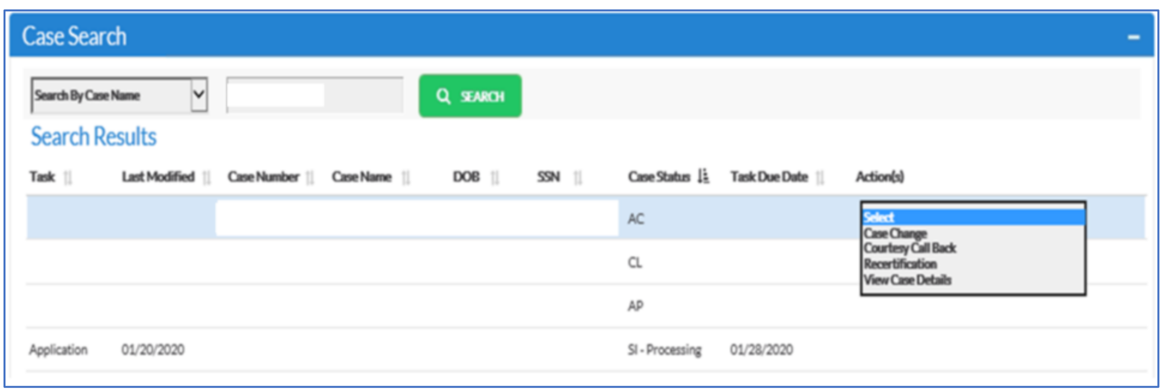
- If the system does not return any cases with **open tasks** in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
- Cases without **open tasks** are those where these is no information in the **Task** and **Last Modified** columns of the **Search Results** section.

(3) **No Task**

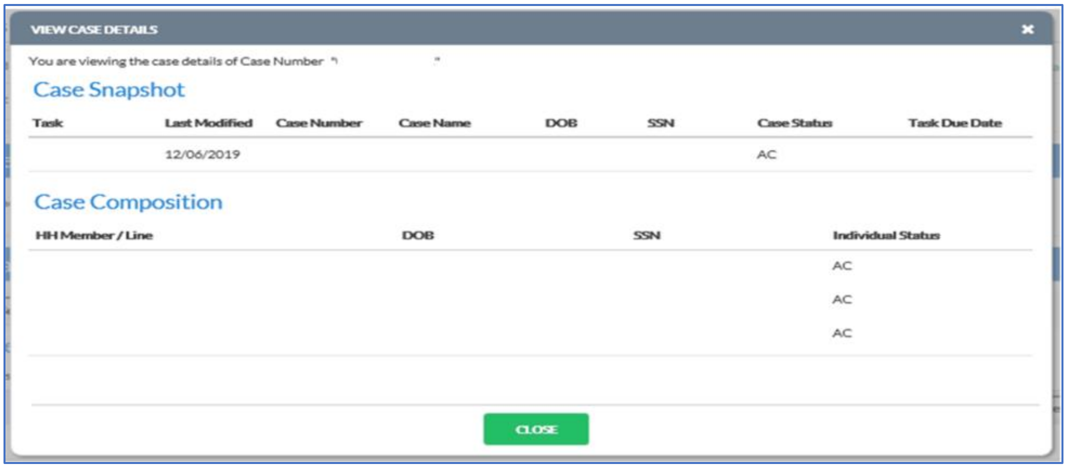
- The System displays the message “No Case found, please refine your search criteria.”

Search Results Actions(s) Combo Box will contain a list of available actions for the Eligibility Specialist. These actions are table-driven. These tables allow control at the following levels:

- Role of Eligibility Specialist (there are many titles within 1 role) - SPOS roles is leveraged to maintain compatibility with POS queues.
- Center designation of the Eligibility Specialist.
- Current Welfare Management System (WMS) case status of the selected case in search results.
- List of activities available for the case, based on the case status and open task.



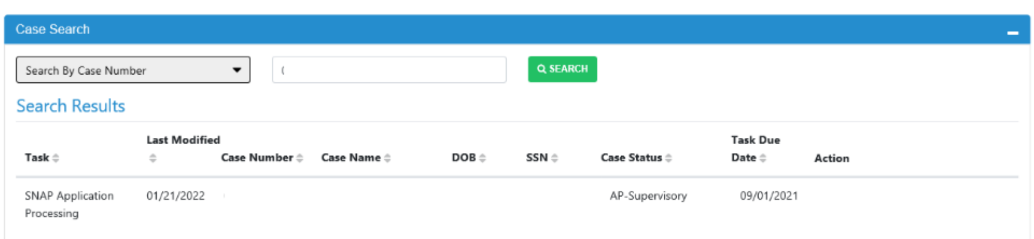
- Selecting the **View Case Details** option from **Action(s)** and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the **Case Snapshot** section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.



Improvements were made in the **Task** column for applications and recertifications in the Case Search:

- When the application is marked as kept in the interview log, the following label appears: **SNAP Application Processing.**
- When the application is on the last interview day (30th day after application date or business day before the 30th day after application date), the following label appears: **SNAP Application Interview Last Day.**
- When the recertification is marked as kept in the **Interview Log**, the word processing was added: **SNAP Recertification Processing.**
- When the participant has submitted their AHRA form, Supplemental Nutrition Assistance Program Application/Recertification (**LDSS-4826**) or the Application/Recertification Supplemental Nutrition Assistance Program (**LDSS-5166)**, but has not completed the recertification interview, the following label appears: **SNAP Recertification Interview.**
- When the participant has submitted their AHRA form, **LDSS-4826** or **LDSS-5166**, but has not completed the recertification interview and is on the last interview day (last business day of processing month), the following label appears: **SNAP Recertification Interview Last Day.**
- When the participant is potentially eligible for an IVRS "no change" recertification, has not completed their recertification interview and has not submitted their AHRA form, LDSS-4826 form nor LDSS-5166 form, the following label appears: **SNAP Recertification Potentially IVRS Eligible**.

Example:



10. Case Search: New Warning Messages for Duplicate Activities

When staff selects an activity other than **Review Case** and **View Details** in **Case Search**, ANGIE will confirm whether the same activity was already completed as part of the current task when the **Go** button is clicked and before launching SPOS.

- If the same activity was already completed in the current task, ANGIE will display the following warning message: **This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?**
  - If the staff clicks **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the **Case Search** will be reset.
- For recertification tasks, if the recertification due date is more than 4 months in the future, ANGIE will display the following warning message: **This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?**
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the **Case Search** will be reset.
- If there was a transmission to WMS on the current day from SPOS, then ANGIE will display the following warning message: **There was a transmission to WMS for this case today. You may be starting a duplicate activity. Continue to SPOS?**
  - If the staff clicks **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the Case Search will be reset.

11. Daily Activity Sheet for Eligibility Specialist

The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist's daily activity as a snapshot of the work completed for the current day. This allows the Eligibility Specialist to keep track of their work and in addition allows management to review the respective Eligibility Specialist's daily progress.

The Daily Activity Sheet provides information on the **Status**, **Start Time**, **Case Number**, **Case Name**, **Start Event**, **WMS Status**, **End Event**, **Decision**, **HH Size**, and **Duration (Mins)**. All columns are sortable.

- **Status**: The icons within this column will provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation point) and **In-Progress** (blue hourglass).
  - For an Interview, the status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.

  - For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
  - When an event is currently in progress:
    - Duration column for that row will display a dash (minus sign).
    - End Event column for that row will display "**N/A**".
- **Start Time**:
  - Displays the time that the event was started in the format: **hh:mm AM/PM**
  - The default view is based on the ascending order of Start Time.
- **Case Number**: This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
  - For **Application** and **Recertification** Task:
    - **Interview Started** - If an Interview was either distributed from **Get Next** or started from **Case Search**, the element must display "Interview Started".
    - **Ready to Assign Event** - For any case that was distributed and started from the **Get Next** button, the **Ready to Assign Event** is displayed. For example, "Mandated Verification Received – Full" event.
    - SPOS Activity - For any Events that were started from **Case Search,** the SPOS Activity must be used. For example, "Application Modification", "Make Case Comment", etc.
  - For **Change Case:** The start event is typically: "Change Case Ready" (if started from **Get Next**) or "Start Processing" (if started from **Case Search**).
  - For **Document Review**, the start event is "Start Document Review".
- **WMS Status**: The existing WMS case status (starting state) – Applying (**AP**), Denied (**RJ**), Single Issue (**SI**), Active (**AC**), Closed (**CL**).
- **End Event:** The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.
  - For any start events in the status of **Interview** in the **Event Log**, the **End Event** is always either: **Suspend Interview** or **Complete Interview**.
  - For **Change Case** events, the system will check whether a Deferral was made in the **Pending** status events; if yes, then the end event is "Deferred/Pending Change Verification". Otherwise, the last event with a status of **Processing** is used.
  - For other **Processing-related** start events other than **Change Case**, the **End Event** is recorded when the Processors finish their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).
  - The **End Event** can be **Complete interview**, **Suspend processing** or **Complete processing**. The End events is further distinguished to have the exact outcome, with the possible values displayed below. The event log will also get updated accordingly.
    1. Complete Interview - No deferral.
       Complete Interview - Deferred for verification.
       Complete Interview - Deferred for Information Verification Service (IVS)/Resource File Integration(RFI)/SDX.

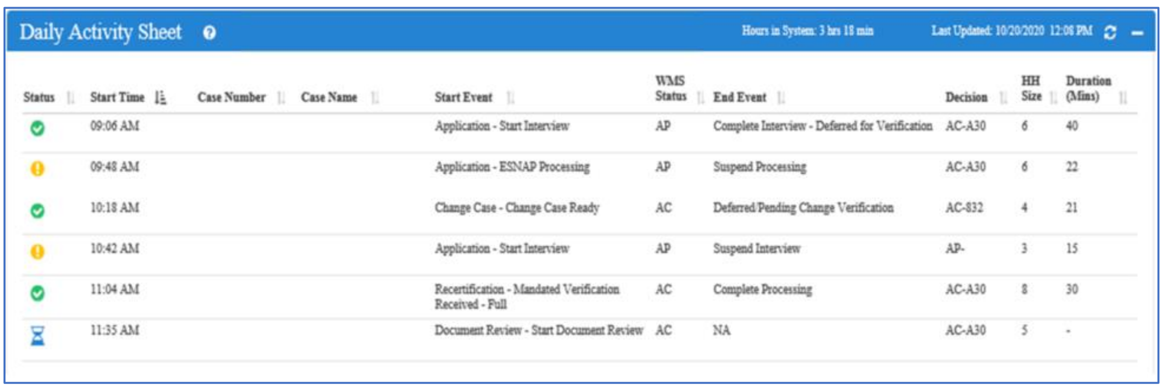
Complete Interview - Deferred for verification and IVS/RFI/SDX
Note: For the **Interview**, the **End Event** should be the latest event with the status of **Interview**.

2. Suspend Processing - Deferred for change verification.
   Note: For processing actions, the end event is the latest event with the status of **Processing**.

    - For cases that are "In Progress", the End Event column will reflect N/A for the respective row.
- **Decision:** This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.
    - The decoded value is needed. For example: **AC-A30** (Same Approval each month), **RJ-V21** (Failure to Provide Verification), **SI-Q22** (Expedited Pending Verification).
    - The description of the code will not be included.
    - If there is no SPOS decision code, then the reason code is blank. For example, "AP- ", "AC-"
- **HH Size:** Number of people in AP, SI or AC status in associated with the WMS case.
- **Duration (Min):** This value is the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
    - For cases that are "In Progress", the duration field is a dash (minus sign) for the respective row.

The header level of the widget shows the time the Eligibility Specialist has spent in the ANGIE system in the format: **Hours in System: X hrs YY min**

- Selection of the **Refresh** button at the header of this widget will refresh the data for the **Daily Activity** widget. Consequently, the last updated timestamp will also be updated.

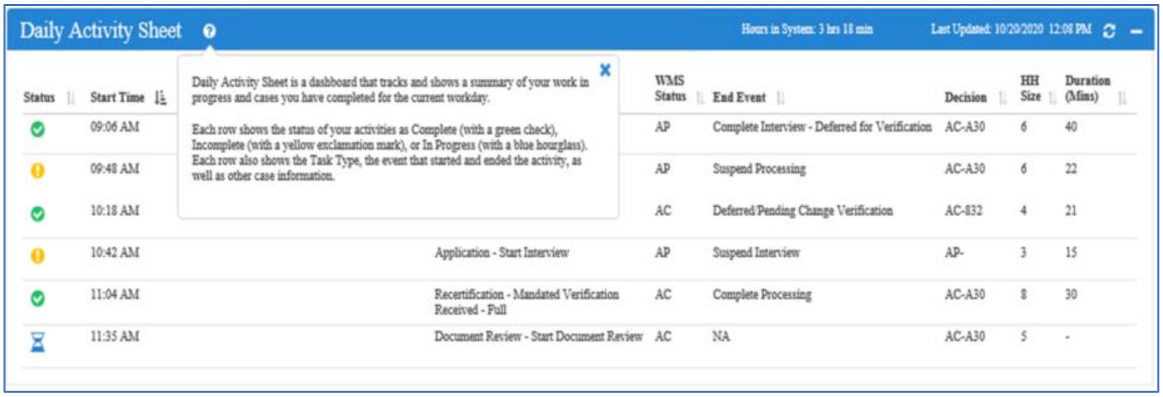

Daily Activity Sheet

Hours in System: 3 hrs 18 min

Last Updated: 10/20/2020 12:08 PM

Status	Start Time	Case Number	Case Name	Start Event	WMS Status	End Event	Decision	HH Size	Duration (Mins)
	09:06 AM			Application - Start Interview	AP	Complete Interview - Deferred for Verification	AC-A30	6	40
	09:48 AM			Application - ESNAP Processing	AP	Suspend Processing	AC-A30	6	22
	10:18 AM			Change Case - Change Case Ready	AC	Deferred/Pending Change Verification	AC-832	4	21
	10:42 AM			Application - Start Interview	AP	Suspend Interview	AP-	3	15
	11:04 AM			Recertification - Mandated Verification Received - Full	AC	Complete Processing	AC-A30	8	30
	11:35 AM			Document Review - Start Document Review	AC	NA	AC-A30	5	-

Help Text is displayed when selecting the **Help** Icon for the **Daily Activity Sheet**:

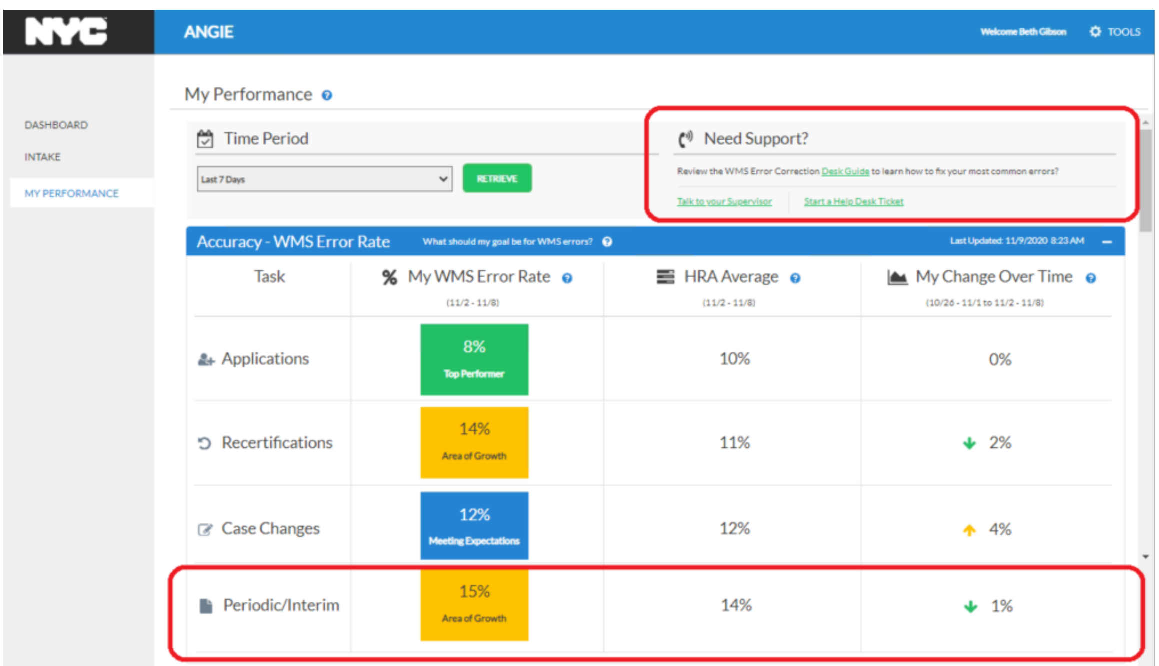


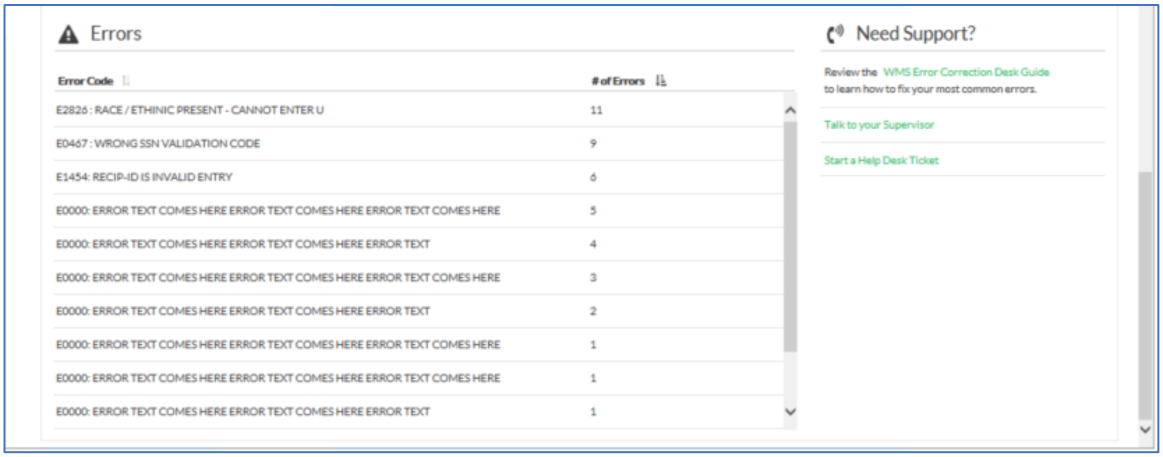
New activity types in R2
In R2, the **Interim Reports**, **Periodic Reports** and **Intakes** completed by staff will also appear in the **Daily Activity Sheet**.

12. My Performance Page for Eligibility Specialist

The Eligibility Specialist has access to the **My Performance** page and can be accessed from the left navigation pane. In R2, information about supervisor returns was added.

The My Performance page of the Eligibility Specialist consists of the **Timeframe Selector,** the **Accuracy – WMS Error Rate** widget and the new **Accuracy – Supervisor Returns** widget as seen below.





Errors

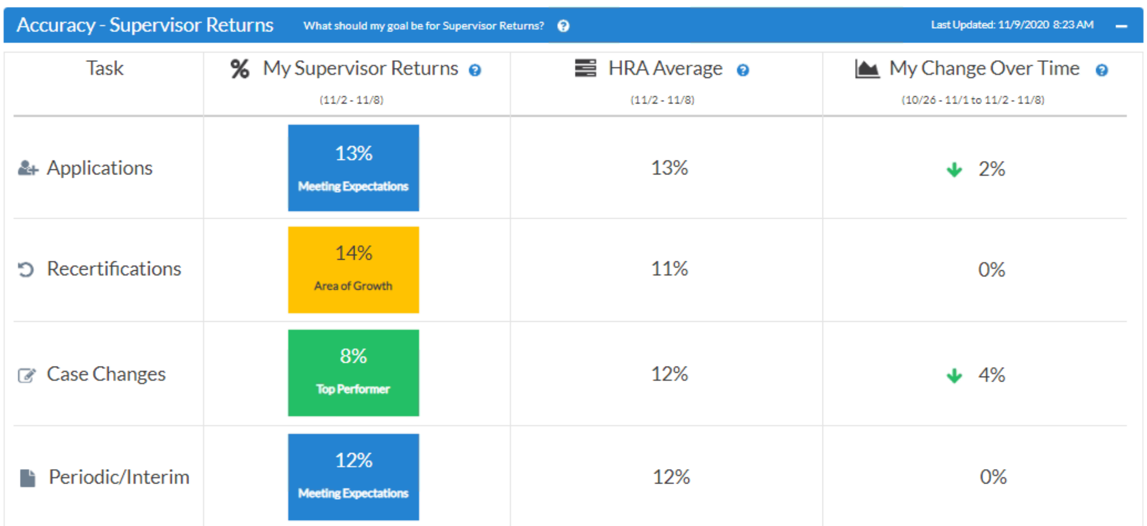
Error Code	# of Errors
E2826 : RACE / ETHINIC PRESENT - CANNOT ENTER U	11
E0467 : WRONG SSN VALIDATION CODE	9
E1454: RECIP-ID IS INVALID ENTRY	6
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	5
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT	4
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	3
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT	2
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	1
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	1
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT	1

Need Support?

Review the WMS Error Correction Desk Guide to learn how to fix your most common errors.

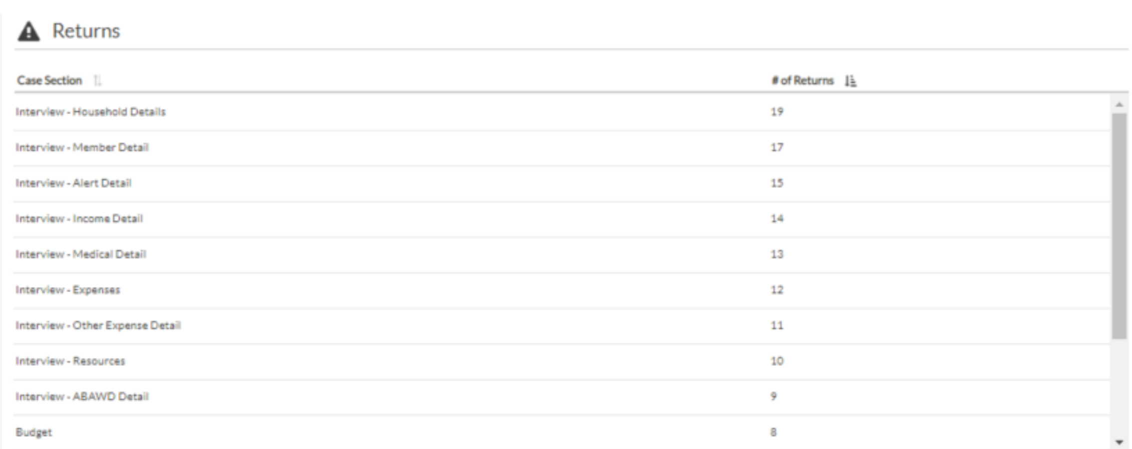
Talk to your Supervisor

Start a Help Desk Ticket



Accuracy - Supervisor Returns What should my goal be for Supervisor Returns? Last Updated: 11/9/2020 8:23 AM

Task	My Supervisor Returns (11/2 - 11/8)	HRA Average (11/2 - 11/8)	My Change Over Time (10/26 - 11/1 to 11/2 - 11/8)
Applications	13% Meeting Expectations	13%	2%
Recertifications	14% Area of Growth	11%	0%
Case Changes	8% Top Performer	12%	4%
Periodic/Interim	12% Meeting Expectations	12%	0%



Returns

Case Section	# of Returns
Interview - Household Details	19
Interview - Member Detail	17
Interview - Alert Detail	15
Interview - Income Detail	14
Interview - Medical Detail	13
Interview - Expenses	12
Interview - Other Expense Detail	11
Interview - Resources	10
Interview - ABAWD Detail	9
Budget	8

Header and **Timeframe** selector
The Eligibility Specialist is required to select the timeframe for the report to generate and can choose from **Last 7 Days**, **Last 30 Days**, ~~or~~ **Last 90 Days**, or a new option of **Last 180 days**. This selection applies to all widgets in the page.

- Once the desired timeframe is selected, selecting the **Retrieve** button will display the corresponding results.

The last section of the header includes the **Need Support?** Area and includes the following links:

- **WMS Error Correction Desk Guide:** Clicking on this link will launch the abridged version of the WMS Error Correction Desk Guide in PDF.
- **Talk to your supervisor:** Clicking on this hyperlink launches Microsoft TEAMS.
- **Start a Help Desk Ticket**: Clicking on this hyperlink launches a Help Desk Ticket.

Accuracy – WMS Error Rate widget
The **Accuracy - WMS Error Rate** widget provides **Error Rates** on the **Applications**, **Recertifications**, and **Case Changes** worked on by the Eligibility Specialist for the set timeframe.

The table provides **Error Rates** on the **Applications**, **Recertifications**, ~~and~~ **Case Changes**, **Interim Reports**, and **Periodic Reports** worked on by the Eligibility Specialist for the set timeframe. It provides the Eligibility Specialist with information on their performance in terms of their own Error Rate (displayed within **My WMS Error Rate**), **HRA Average Error Rate** (displayed within **HRA Average**), and keeps track of the Eligibility Specialist's current Error Rate over the previous period (displayed within **My Change Over Time**).

My WMS Error Rate column:

- At the header level, the actual dates for the timeframe selected is displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- WMS Error Rate **Calculation**: Numerator = number of errors made on that type of task. Denominator = total number of that type of task submitted to WMS.
    - Both the numerator and the dominator must occur within the timeframe in order to be part of the WMS Error Rate Calculation.
    - The WMS Error Rate is displayed as a percentage.
    - If the Eligibility Specialist did not perform any tasks (0 tasks) for the selected time period (e.g. The Eligibility Specialist did not do any Case Changes in the Last 7 Days [selected period], and only worked on Applications and Recertifications), **N/A** is displayed across the Case Changes row. In this example, Applications and Recertifications will have Error Rates across the rows.

- Depending on the WMS Error rate comparison to the HRA Average, the following depictions are used:
    - If the Eligibility Specialist's Error Rate for the selected period is less than the HRA Average, the header will read **Top Performer** colored in a green color block.
    - If the Eligibility Specialist's Error Rate for the selected period is the same as the HRA Average the header will read **Meeting Expectations** colored in a blue color block.
    - If the Eligibility Specialist's Error Rate for the selected period is greater than the HRA Average, the header will read **Area for Growth** colored in a yellow color block.

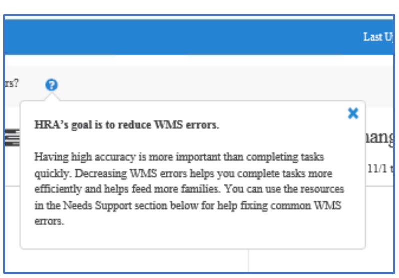
HRA Average column:

- At the header level, the actual dates for the selected time period is displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Shows the average **WMS Error Rate** for all other Eligibility Specialists for the selected time across each **Task Type** (Applications, Recertifications, Case Changes, and Periodic/Interim Reports).

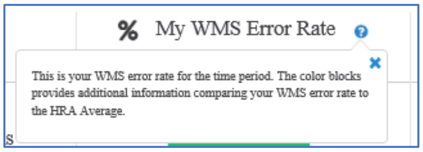
My Change over Time column:

- At the header level, the actual dates for the previous time period are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd].
- If this period's **Error Rate** is below that of the last period, there is a green arrow pointing downwards, followed by the change in percent.
- If this week's **Error Rate** is the same from the last week, it will only display "0%".
- If this week's **Error Rate** is above that from the last week, there is a yellow arrow pointing upwards, followed by the change in percent.

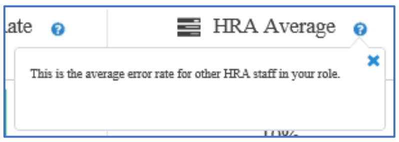
Help text for "**What should my goal be for WMS errors?**" when selecting the help icon:



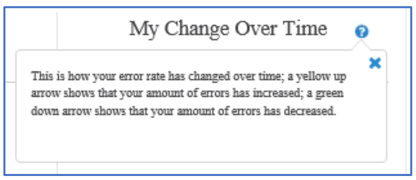
Help Text displayed when selecting the help icon for My WMS Error Rate column as shown below:



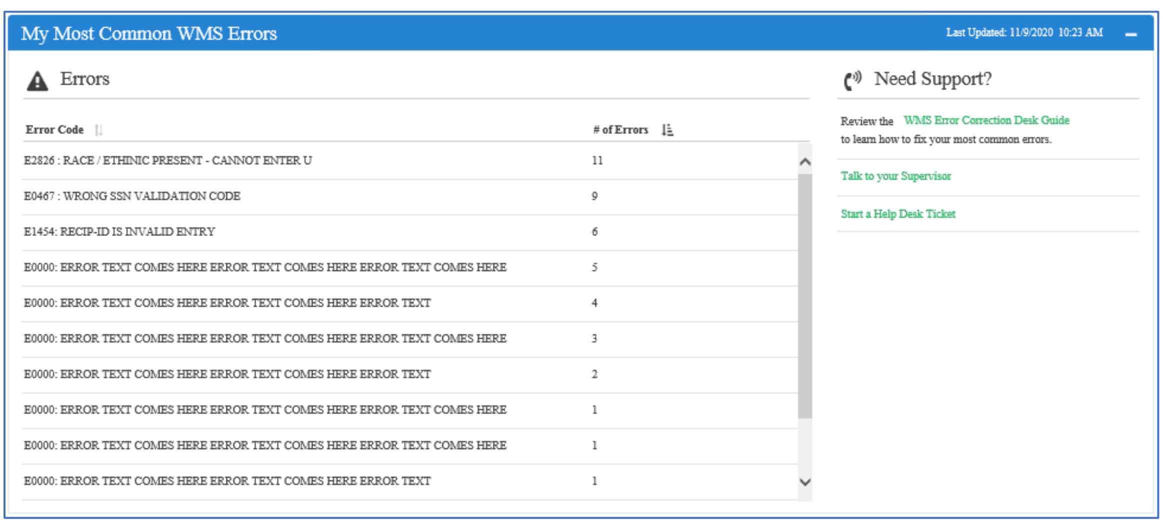
Help Text displayed when selecting the help icon for this column as shown below:



Help Text displayed when selecting the help icon for this column as shown below:



The **My Most Common WMS Errors** widget has a summary table of the Eligibility Specialist's most common Errors for the selected time period. The table consists of two columns. The **Error Code** column shows the name of the WMS Error(s). The **# of Errors** column shows the count of the number of corresponding WMS Errors. Both columns are sortable.



Accuracy-Supervisor Returns widget

- The **Accuracy – Supervisor Returns** widget displays comparative information as measured in respect to performance of other HRA staff in the same role and in the same time period, as compared against the Eligibility Specialist's overall performance from the previous time period.
- The Header of **Accuracy-Supervisor Returns** widget consists of the following:
  - Widget Name: The name of the respective widget is displayed.
  - Help Text Icon: Upon selection will display the corresponding help text for this widget.
  - Last Updated: Last updated timestamp on when the data was last updated.
  - A button to minimize or maximize the widget.

Task column:

- This column consists of the row-headers of **Applications**, **Recertifications**, **Case Changes**, and **Periodic/Interim**. It should be noted that periodic report and interim report data are combined into this one row.

My Supervisor Returns column:

- This column displays the Eligibility Specialist's **Supervisor Returns** for the selected timeframe for each of the Task Types:
- At the header level, the actual dates for the timeframe selected is displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Supervisor Returns **Calculation**: Both the numerator and the dominator must occur within the timeframe in order to be part of the **Supervisor Returns** Calculation.
  - The **Supervisor Returns** is displayed as a percentage.
  - If the Eligibility Specialist did not perform any tasks (0 tasks) for the selected time period (e.g. The Eligibility Specialist did not do any **Case Changes** in the Last 7 Days [selected period], and only worked on Applications, Recertifications, Periodic/Interim), **N/A** is displayed across **Case Changes** row. In this example, Applications, Recertifications, Periodic/Interim will have Error Rates across the rows.
- Depending on the **Supervisor Returns** comparison to the HRA Average, the following depictions are used:
  - If the Eligibility Specialist's **Supervisor Returns** for the selected period is less than the HRA Average, the header will read **Top Performer** colored in a green color block.
    - The following informational text is displayed upon hovering over the "Top Performer" label: "You're in the top 15% of all HRA staff in your role."

- If the Eligibility Specialist's **Supervisor Returns** for the selected period is the same as the HRA Average the header will read **Meeting Expectations** colored in a blue color block.
  - The following informational text is displayed upon hovering over the "Meeting Expectations" label: "You're in the average range for all HRA staff in your role."
- If the Eligibility Specialist's **Supervisor Returns** for the selected period is greater than the HRA Average, the header will read **Area for Growth** colored in a yellow color block.
  - The following informational text is displayed upon hovering over the "Area for Growth" label: "Your performance in this area is not as strong as other HRA staff in your role – your supervisor can help you improve."

HRA Average column:

- The column displays the average **Supervisor Returns** Rate for all other Eligibility Specialists for the selected time across each Task Type.
- At the header level, the actual dates for the selected time period is displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]

My Change Over Time column:

- This column displays the Eligibility Specialist's change in **Supervisor Returns** Rate from the previous time period (based on the time frame selection) to this time period across each Task Type.
- At the header level, the actual dates are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd]
- If this period's **Supervisor Returns** Rate is better than the last period, there is a green arrow pointing downwards, followed by the change in percent.
- If this period's **Supervisor Returns** Rate is the same from the last period, it will only display "0%".
- If this period's **Supervisor Returns** Rate is worse than last period, there is a yellow arrow pointing upwards, followed by the change in percent

<u>**Supervisor Returns by Section Widget**</u>

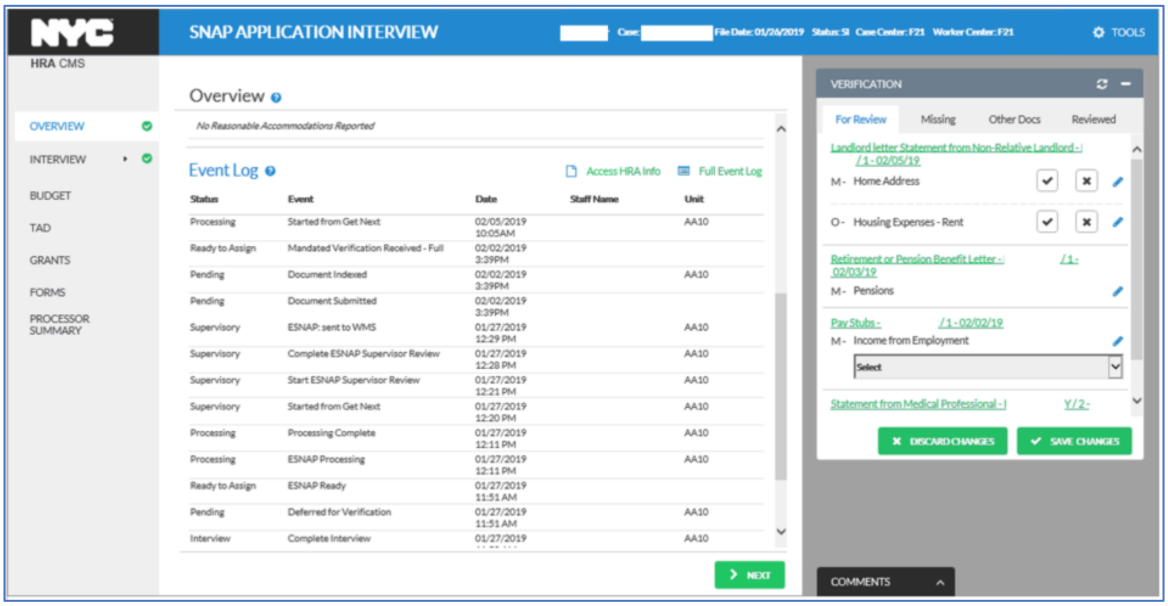
- The **Supervisor Returns by Section** is displayed after the **Accuracy – Supervisor Returns** chart**.** It includes a table of two sortable columns of **Case Section** and **# of Returns**:
- **Case Section** column: This column displays the same sections as the Supervisor disapproval mechanism. For example, if "Expenses" is one Supervisor disapproval section, then only Expenses should be displayed on this table (along with the count of Supervisor Returns for Expenses). However, if

Expenses is broken up into Heat, Rent, etc., then the individual components should be listed (along with the count of Supervisor Returns for the respective sub-section).

- **# of Returns** column: This column shows the count of the number of corresponding Supervisor Returns the Eligibility Specialist has for the respective Streamlined Paperless Office System (SPOS) Case Section.

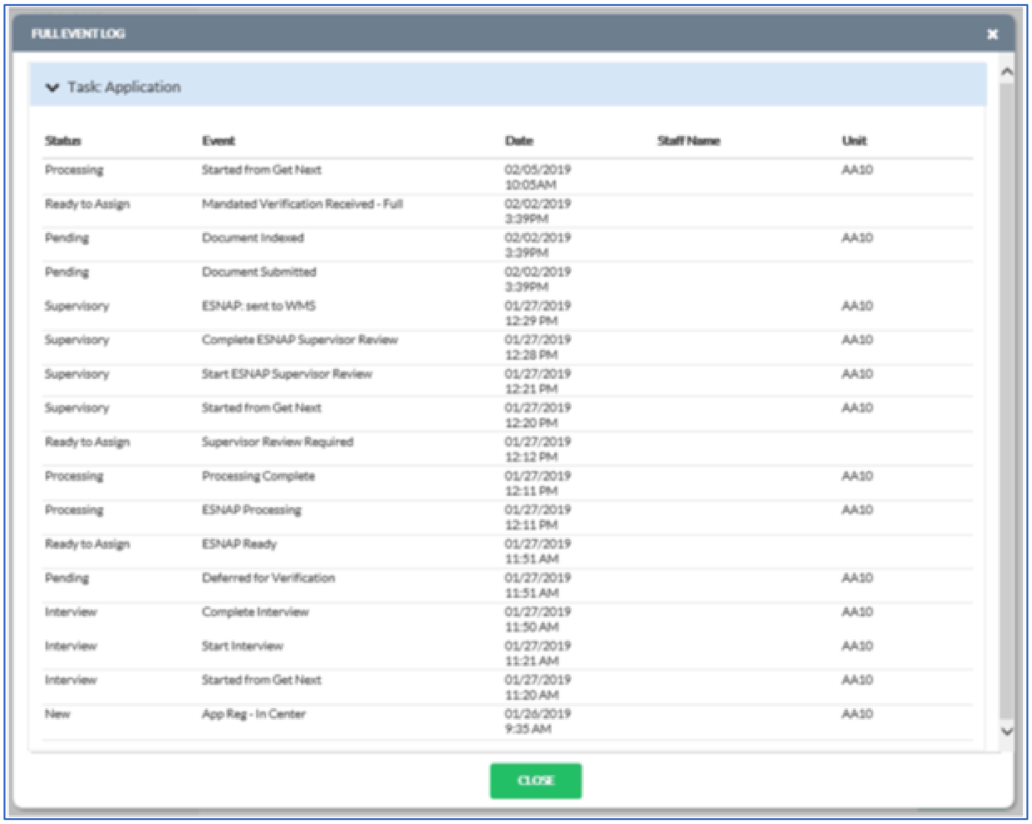
13. Event Log

A newly added **Event Log** section is displayed on the **Overview** screen of the SPOS application. The event log section of the **Overview** screen only shows the events for the current task. This read-only grid will provide information on the **Status**, **Event, Date**, **Staff Name**, and **Unit**.



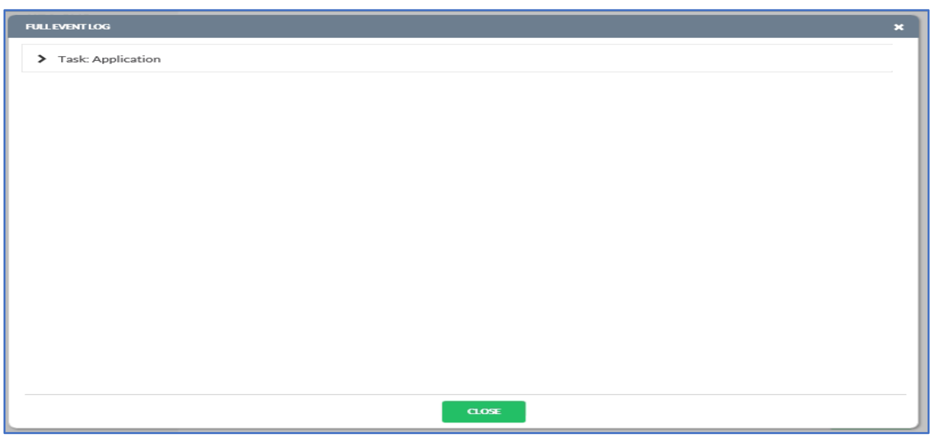
The Eligibility Specialist can see the complete events for all tasks upon selecting the **Full Event Log** link within the **Event log** section of the **Overview** screen.

- Upon selection of the link, a modal window opens showing all the events for all the tasks on the respective case. Below shows the **Full Event Log for** the **Application Interview Activity.**



Status	Event	Date	Staff Name	Unit
Processing	Started from Get Next	02/05/2019 10:05AM		AA10
Ready to Assign	Mandated Verification Received - Full	02/02/2019 3:39PM		
Pending	Document Indexed	02/02/2019 3:39PM		AA10
Pending	Document Submitted	02/02/2019 3:39PM		
Supervisory	ESNAP: sent to WMS	01/27/2019 12:29 PM		AA10
Supervisory	Complete ESNAP Supervisor Review	01/27/2019 12:28 PM		AA10
Supervisory	Start ESNAP Supervisor Review	01/27/2019 12:21 PM		AA10
Supervisory	Started from Get Next	01/27/2019 12:20 PM		AA10
Ready to Assign	Supervisor Review Required	01/27/2019 12:12 PM		
Processing	Processing Complete	01/27/2019 12:11 PM		AA10
Processing	ESNAP Processing	01/27/2019 12:11 PM		AA10
Ready to Assign	ESNAP Ready	01/27/2019 11:51 AM		
Pending	Deferred for Verification	01/27/2019 11:51 AM		AA10
Interview	Complete Interview	01/27/2019 11:50 AM		AA10
Interview	Start Interview	01/27/2019 11:21 AM		AA10
Interview	Started from Get Next	01/27/2019 11:20 AM		AA10
New	App Reg - In Center	01/26/2019 9:35 AM		AA10

Within the **Modal** window, each task can be expanded or collapsed upon selection as seen below.



New activity types in R2

In R2, the **Interim Reports**, **Periodic Reports** and **Intakes** started or completed by staff will also appear in the Event Log.

Event Log update for notifications

New events will be tracked in ANGIE for email and robocall notifications for applications and recertifications:

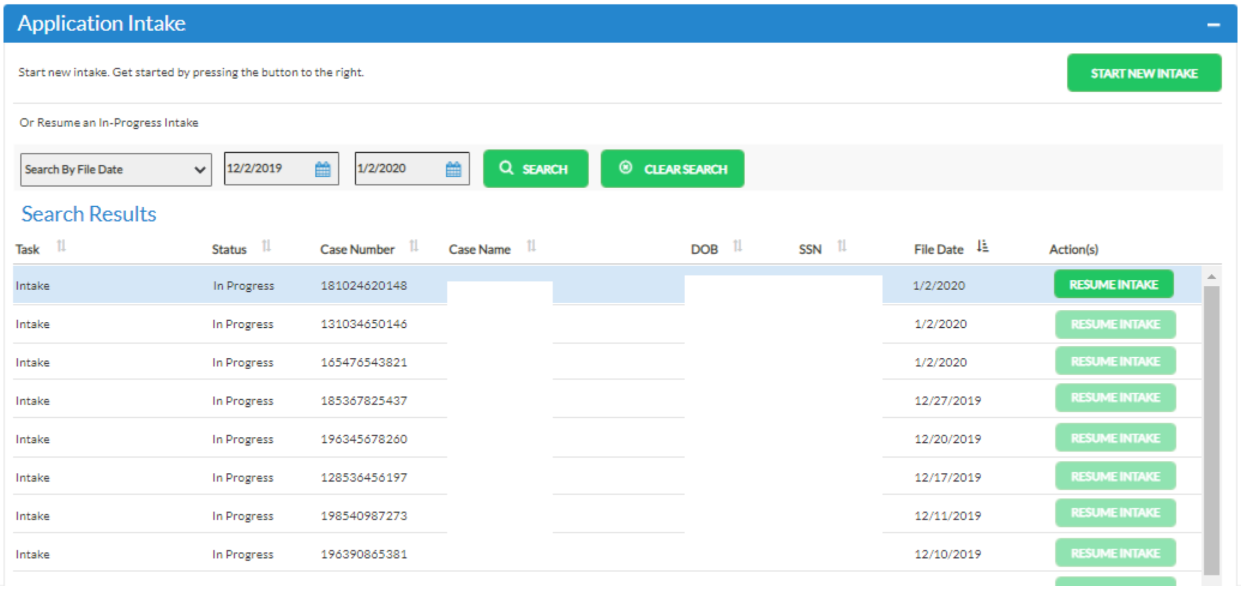
- Access HRA Notification Appointment Reminder
- Access HRA Notification Recertification Due Date Approaching
- Email Notification for Recertification Submission
- Email Notification for Recertification Interview
- Robocall Reminder for Recertification Submission
- Robocall Reminder for Recertification Interview
- Robocall Reminder for Application Interview

14. SNAP Intake List

The workers will no longer need to access multiple intake activities to register a SNAP case. A new **Intake List** will be added to allow the worker to register a new SNAP case and to resume a suspended intake. The worker will need the **SNAP Intake** skillset to access to the Intake List.

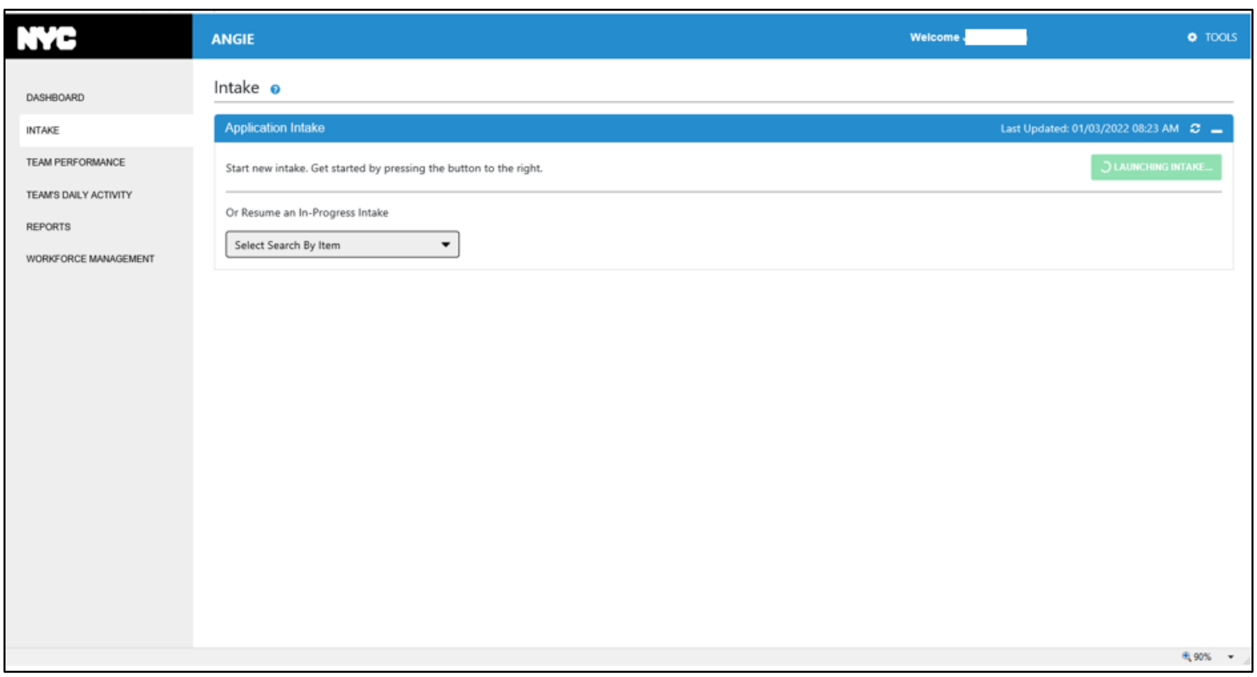
The list includes the following information:

- **Start New Intake** button – allows the worker to start a new intake.
- **Task** – type of intake.
- **Status** – current status on the case (In Progress [Suspended], Completed).
- **Case Number** – case number associated with a particular case.
- **Case Name** – name of the Head of Household on the case.
- **DOB** – date of birth of the Head of Household on the case.
- **SSN** – Social Security Number of the Head of Household on the case.
- **File Date** – date of when a particular case was filed.
- **Action** – with the **Resume Intake** button (only available if the action was suspended)
    - The Eligibility Specialist can resume the suspended SNAP intake by selecting it from a list.
    - The Eligibility Specialist can search by Case Name, or by SSN to refine the search results.



15. SPOS Activity: SNAP Intake

A new **SNAP Intake** activity was added in ANGIE to allow registration of new SNAP cases. The new activity is accessed through the **Intake List.**

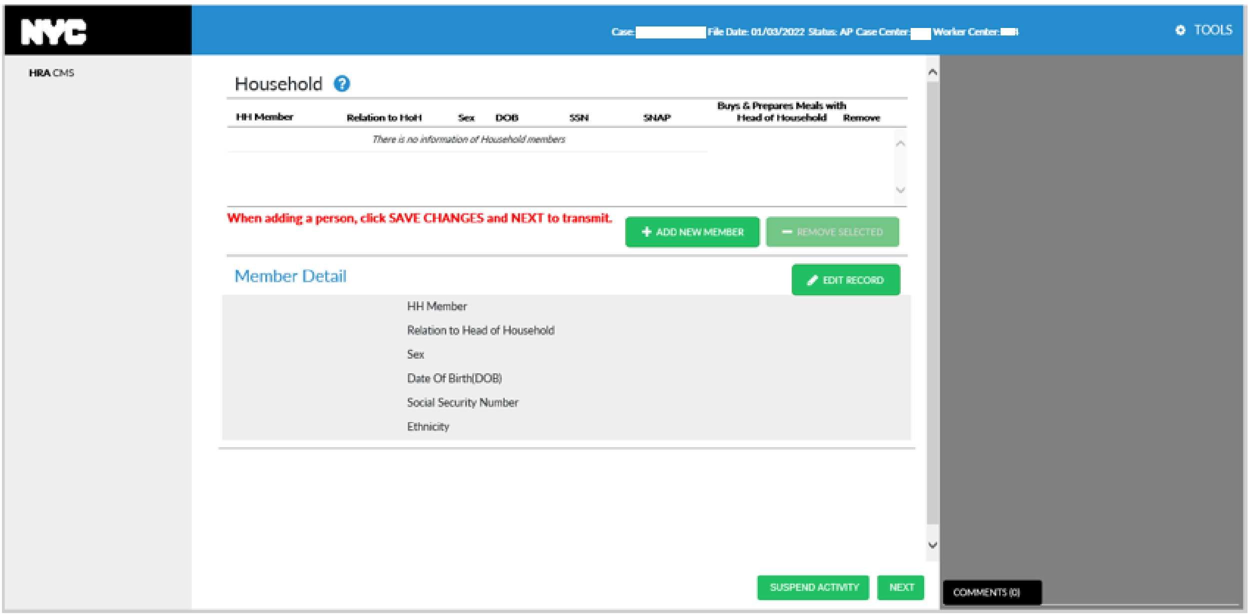


This new activity consists of the 3 screens:

- **Household**
- **Contact Info**
- **Action**

Household screen
This screen allows the ES to add the members of the household. The first household member added is the head of household, with a relationship of **Casehead** or **Payee**.

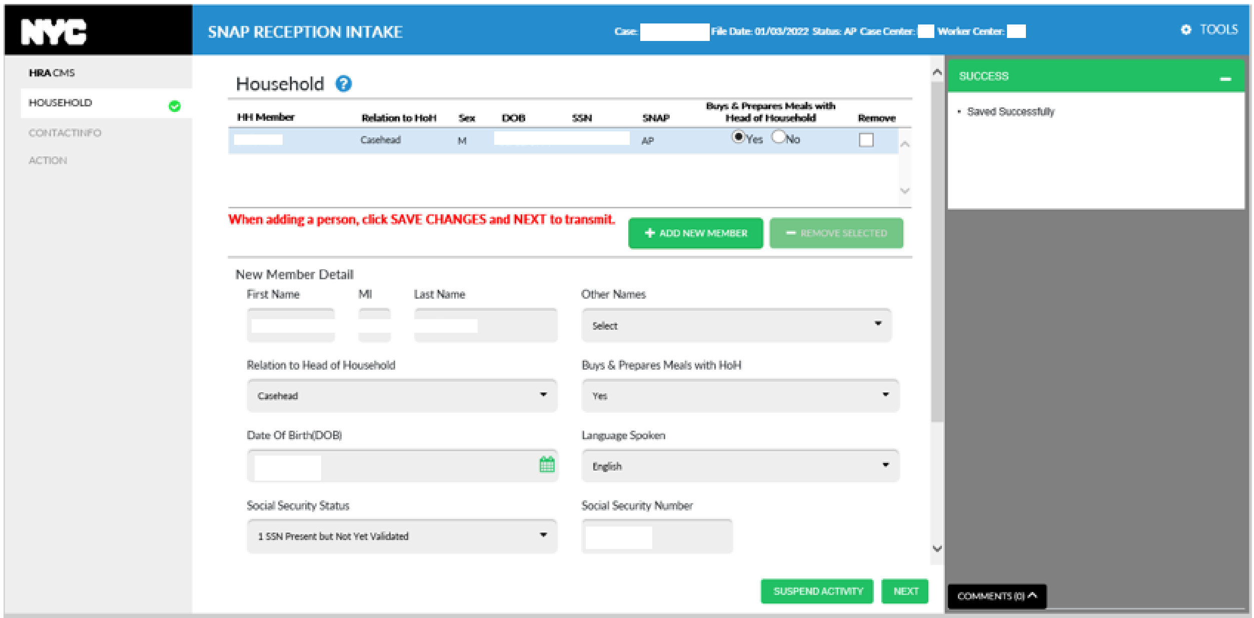
The ES clicks on the **Add New Member** button to add the household members.



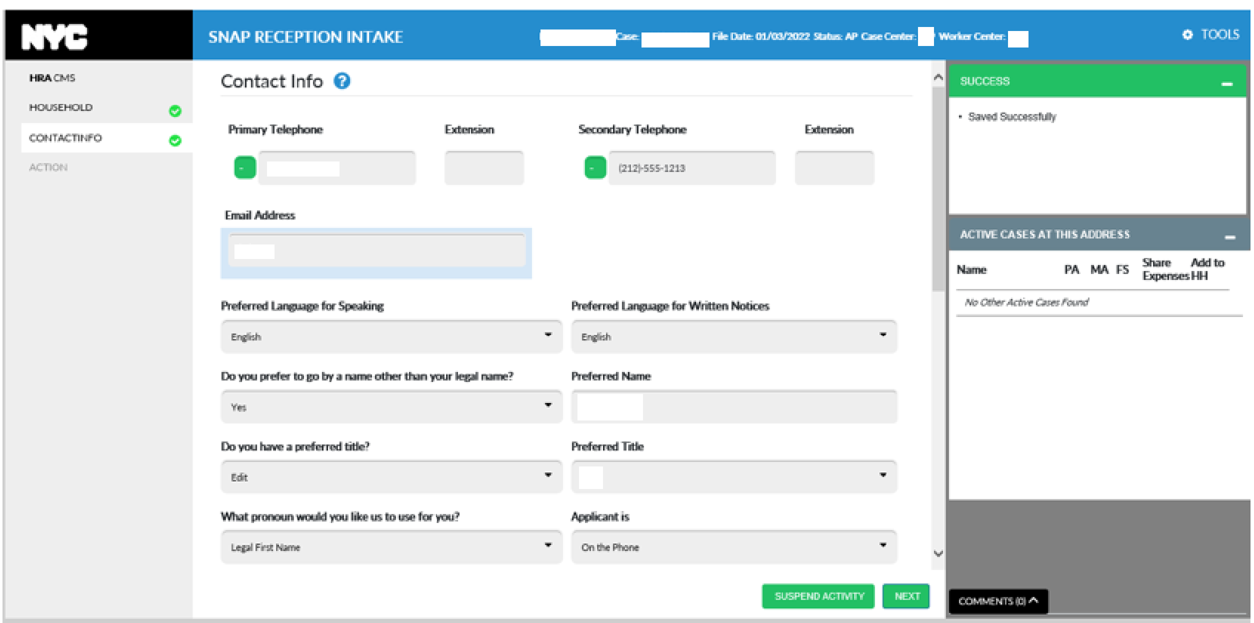
The ES must enter the new member details, including:

- First name
- Middle initial (if any)
- Last Name
- Other names (if any)
- Relation to head of household (HoH)
- Buys & prepares meals with HoH
- Date of birth
- Language spoken (for household members 18 years of age or older)
- Social Security Status
- Social Security Number (SSN) (when Social Security Status selected is 1)
- Sex
- Ethnicity

- The ES then clicks the **Save Changes** button to save the entries. To add additional applying household members, the ES clicks the **Add New Member** button.
- When all household members are added, the ES clicks **Next** to continue the intake.



Contact Info screen
This screen allows the ES to enter the address, contact, and language preference details for the case.



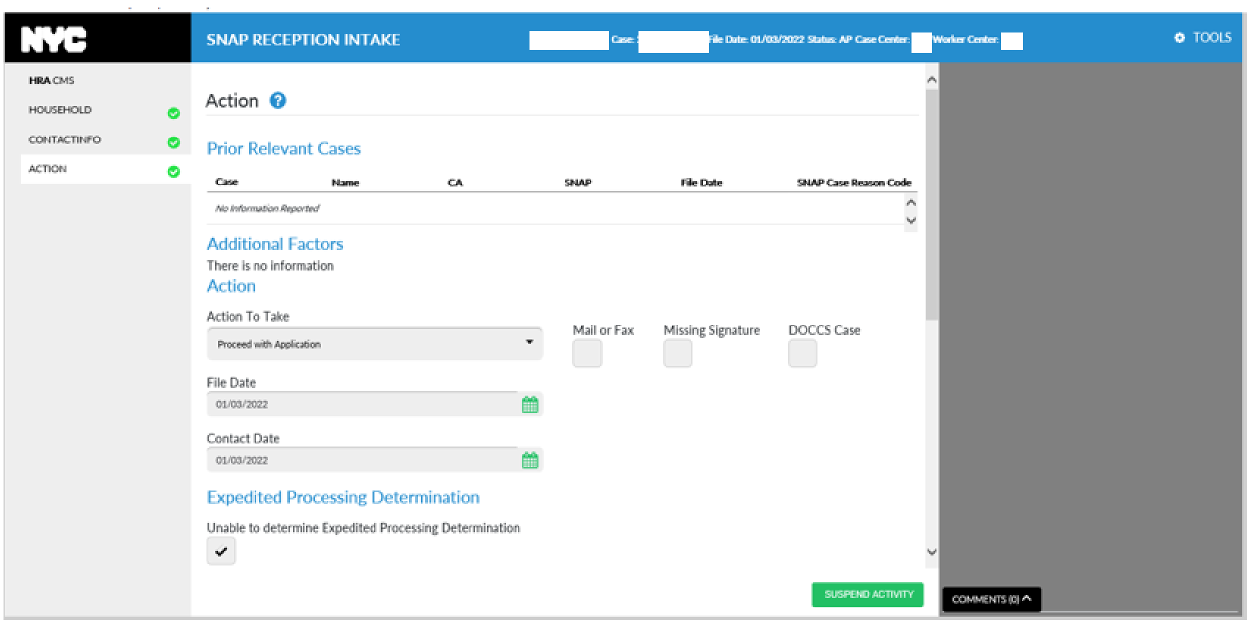
The ES must enter the following details:

- Primary telephone (if any) and extension (if any).
- Secondary telephone (if any) and extension (if any).
- Email address (if any).
- Preferred language for speaking.
- Preferred language for written notices.

- Do you prefer to go by a name other than your legal name?
  - If yes, the Preferred Name field appears.
- Do you have a preferred title?
  - If yes, the Preferred Title field appears.
- What pronoun would you like us to use for you?
- Applicant is?
- Residential address.
- Mailing address (if any).
- Advocate address (if any).
- Authorized representative (if any).
- Contact preferences.
- Text phone (if any).

- Once the required entries are made, the ES clicks the **Save Changes** button. To proceed to the next screen, the ES clicks the **Next** button.

Action screen
This screen allows the ES to view any existing cases for the applicant, to select a disposition, update the file date and contact date (if needed), complete the expedited processing determination and select the type of interview for the application. After the required information is entered, the ES registers the case in WMS from this screen.



The screen contains the following sections:

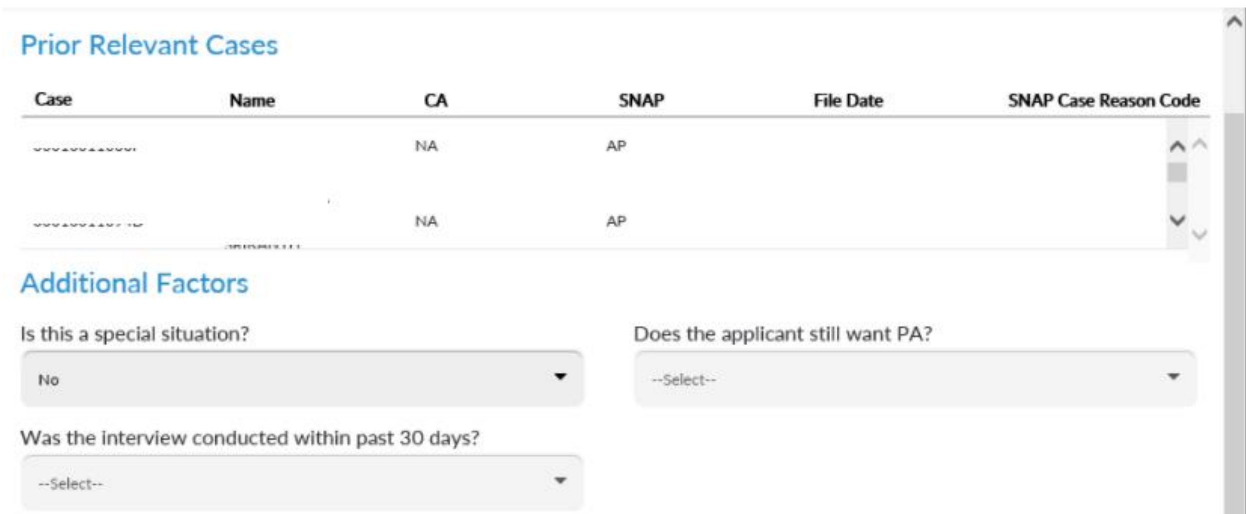
- Prior relevant cases
- Additional factors
- Action

- Expedited processing determination
- Working families SNAP initiative
- Interview type

Prior relevant cases and **Additional factors** sections
The **Prior relevant cases** section displays any open cases, recently rejected cases and recently closed cases for CA or SNAP for the applicant in WMS. When no cases are found, it displays a message of No information reported. When any open cases are found, the **Additional factors** section open up to 3 questions:

- Is this a special situation?
- Does the applicant still want PA?
- Was the interview conducted within past 30 days?

The answer to these questions may lead to a referral to the center where the applicant currently has an open case. The ES must <u>not</u> prevent the applicant from applying when open or recent cases are found.



Action section
The **Action** section allows the ES to select the next step for the intake in the **Action** section.

If the intake will not continue because the applicant does not want to proceed with an application, the ES selects one of the following options:

- End the application
- Continue CA center
- Continue SNAP center

To continue with the case registration, the ES selects **Proceed with Application** and takes the following optional steps**:**

- If the case is a mail or fax application, the ES clicks on the **Mail/Fax** checkbox.
- If there is a missing signature on the application, the ES clicks on the **Missing checkbox**
- If the case is part of the special Department of Corrections and Community Supervision (DoCCS) initiative, the ES clicks the **DOCCS Case** checkbox.
    - Checking this box opens a mandated **Expected date of discharge** field and sets the **Case Center** to F11.
- The file date and contact date can be back-dated, if required for the case.

When the ES proceeds with the application, they must complete the **Expedited processing determination**, **Working families SNAP initiative,** and **Interview type** section to register the case.

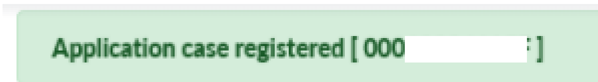
Expedited processing determination section
The ES must review the application and complete the expedited processing determination fields. This includes whether the applicant already received SNAP benefits in the month of application, information about income, resources, shelter and utility expenses, and migrant or seasonal farm worker income. Based on the answers, SPOS displays the outcome. If insufficient information was provided to make this determination, the ES must click the **Unable to determine Expedited Processing Determination** checkbox.

Working families SNAP initiative section
The ES must check the checkboxes in this section if at least one household member works at least 30 hours per week or earns at least 30 times the Federal minimum wage per week (currently $217.50 per week), or at least 2 household members work at least 20 hours per week or earn at least 20 times the Federal minimum wage per week (currently $145 per week).

Interview type section
This section allows the ES to select the Interview Type, which can be a telephone interview or an in-center interview.

- For an in-center interview, the ES must select the date and time of the interview.
- The **Case Center** is initially prefilled by SPOS based on the residential zip code for the case, but can be updated by the ES.
- The ES must enter the caseload for the case.
- After entering the required information, the ES clicks the **Save Changes** button.
- Once the changes are saved successfully, the ES clicks the **Register Case** button to transmit the application to WMS.

- SPOS submits the information to WMS and displays the WMS case number once the case is registered. The activity closes and the ES returns to their home page in ANGIE.



- If the registration is not successful, an error message appears for the ES, who must review the case information to apply any fixes needed.

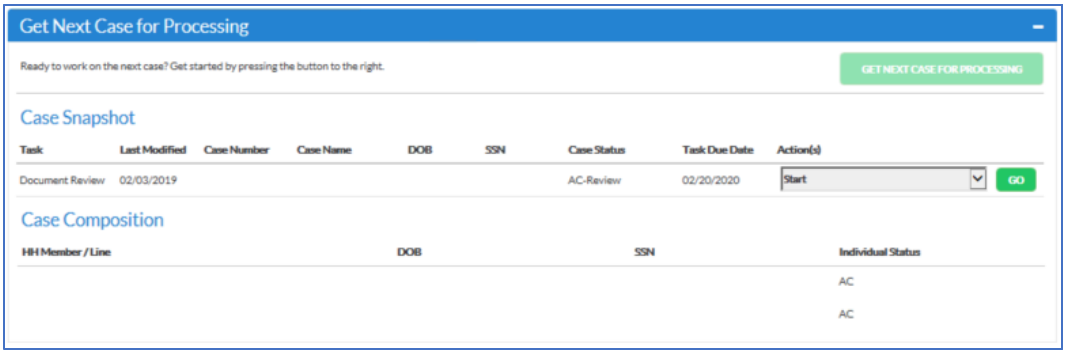
16. SPOS Activity: Document Review

ANGIE assigns a task known as **Document Review** when documents are received for an active (AC) case and there is no pending recertification or case change task for the case.

The SPOS **Document Review** activity allows the Eligibility Specialist to review newly submitted applicant/participant facing documents for active SNAP cases to determine whether changes are required based on the submitted information. The **Document Review** task is distributed to the Eligibility Specialist based on the priority logic.

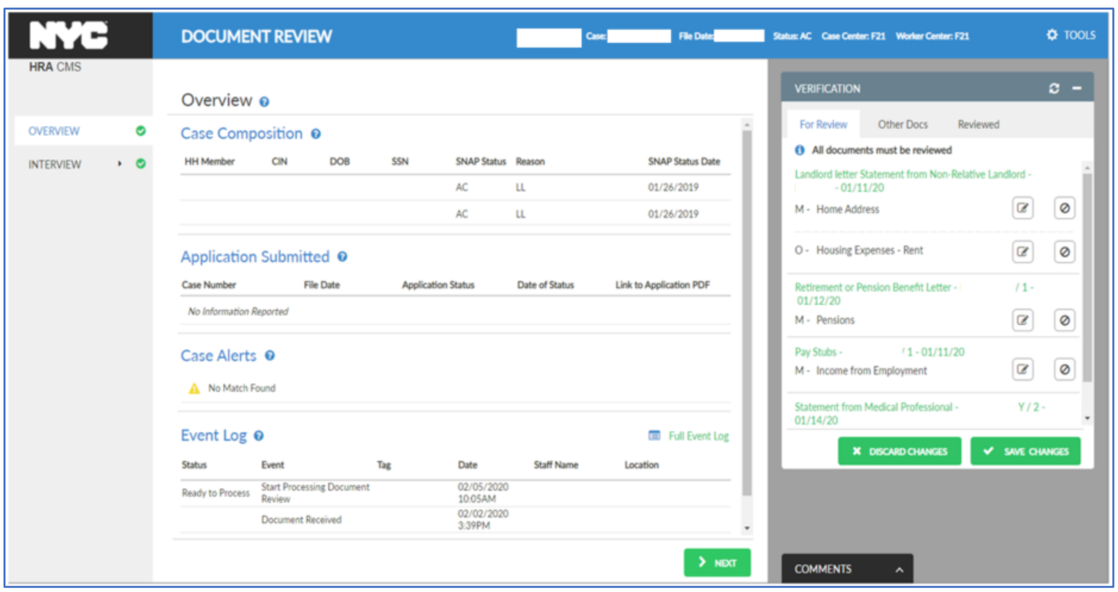
- The **Document Review Activity** starts when the Eligibility Specialist selects the "**Get Next Case for Processing**" button. The system assigns the next available Task with the highest priority that is ready to be worked.

The Eligibility Specialist will see the case profile.

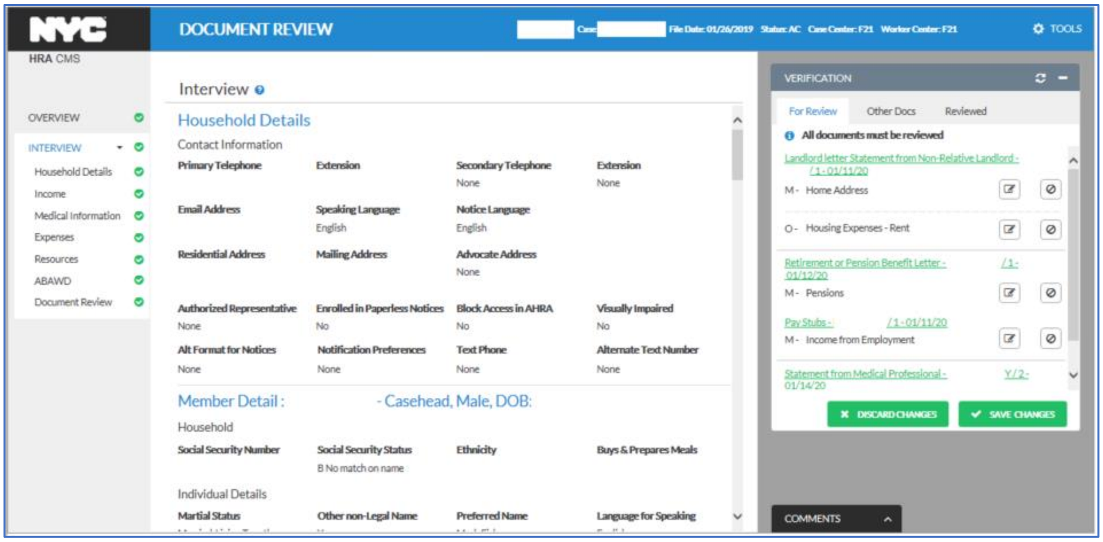


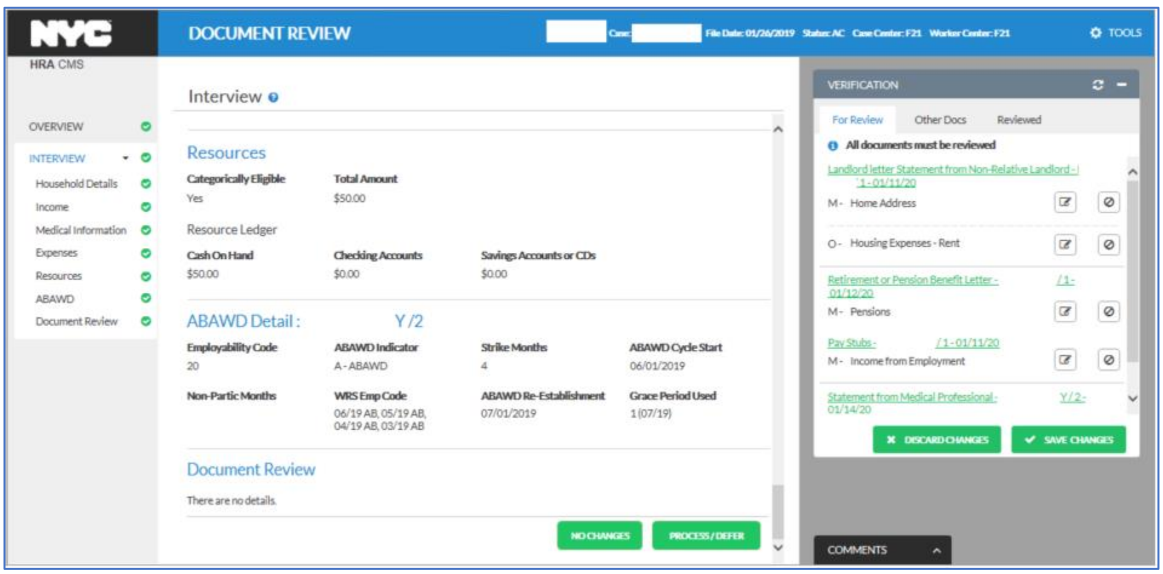
- Selecting the **Start** action and clicking on the **Go** button from ANGIE, opens the **Document Review Activity** in the Streamlined POS (SPOS) application. All work processed in SPOS during the Document Review Activity is tracked within ANGIE.

The **Overview** screen is the landing page of the **Document Review** activity. The **Overview** screen and **Interview Review** screens are accessible to the Eligibility Specialist in the **Document Review** activity.



- Selecting the **Next** button on the bottom of the **Overview** page navigates the Eligibility Specialist to the **Interview Review screen**. The Eligibility Specialist does not have access to the editable interview through the **Edit** (pencil) icons on the **Interview Review** screen. The Eligibility Specialist can also access the **Interview Review** screen by selecting the **Interview** link on the left navigation pane.

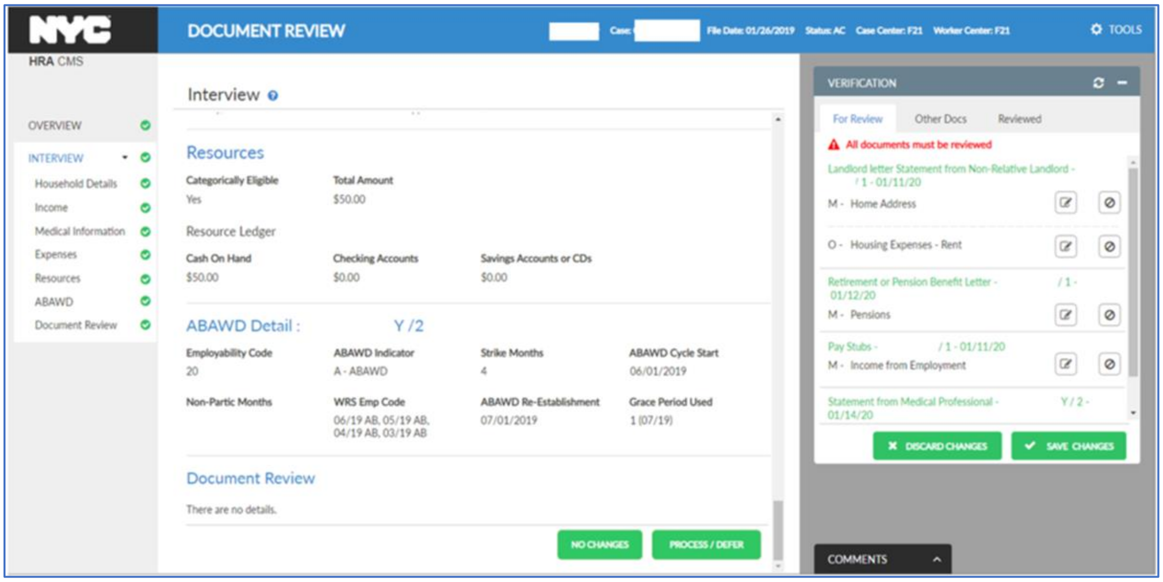




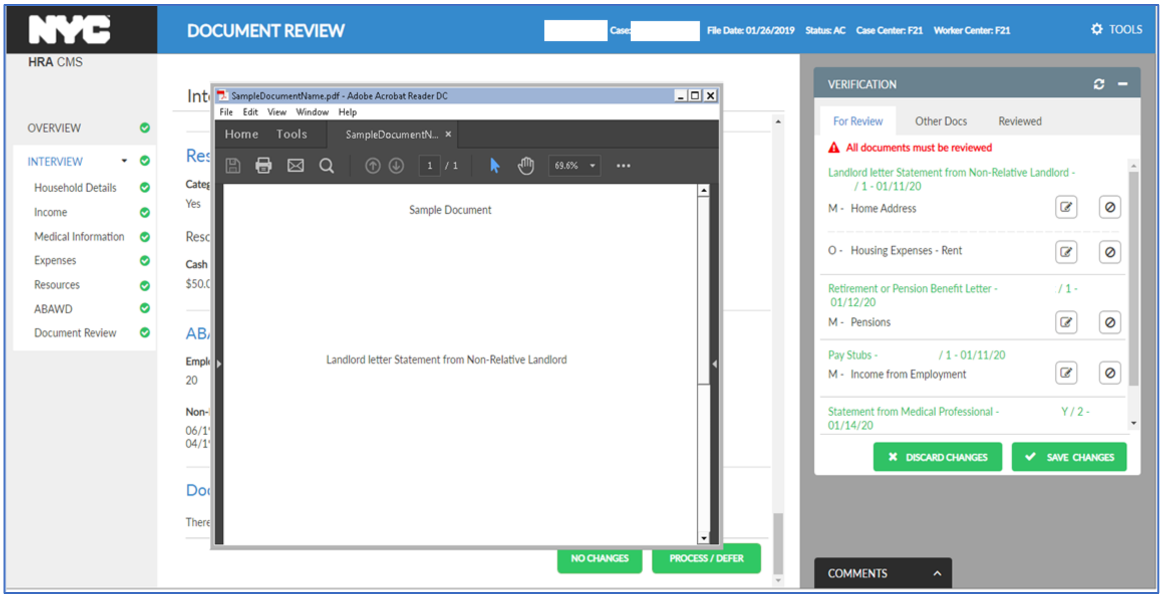
The Eligibility Specialist does <u>**NOT**</u> have access to the editable Interview through the **Edit** (pencil) icons on the **Interview Review** screen. The middle panel displays the complete read only summary details of the Interview. In addition to the standard Interview details, it also displays the new section of **Document Review** details. Initially before reviewing any documents, there is no information of a document review and therefore the message “**There are no details**” is displayed, as seen above.

The bottom of the **Interview Review** screen contains the action buttons consisting of **No Changes** and **Process Defer** buttons.

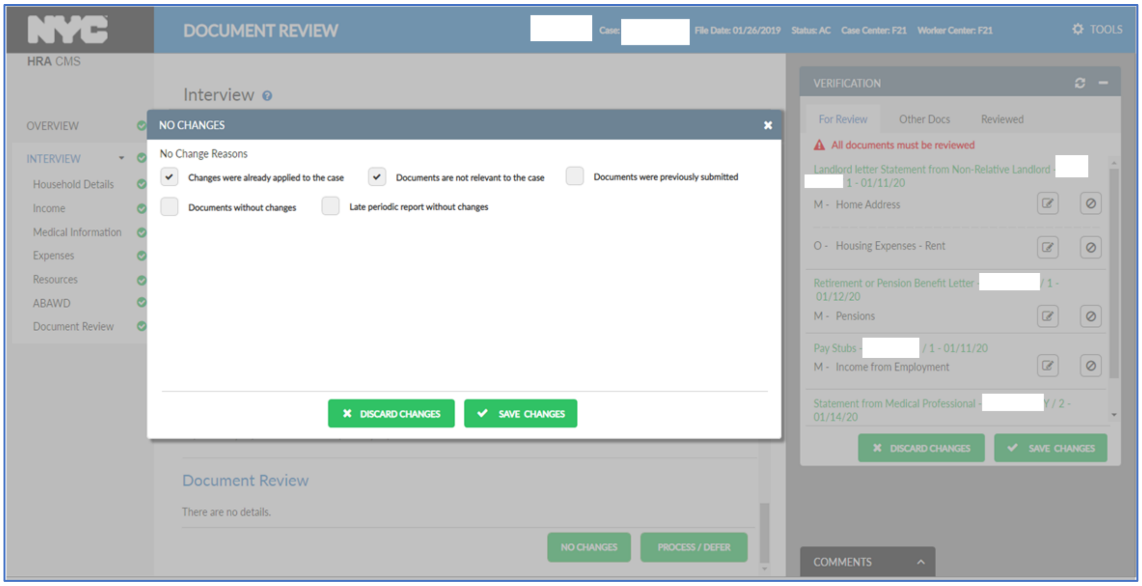
- All the documents in the verification widget under “**For Review**” tab MUST be reviewed before clicking on the “**No changes**” or “**Process/Defer**” buttons at bottom. If the Eligibility Specialist tries to skip the document review and clicks on the bottom "**No Changes**" or "**Process/Defer**" button then the system displays the error message "**All documents must be reviewed**" (red color) in verification widget as seen below.



- Clicking on **Document link** (green color) in the verification widget will open a PDF of the document in a popup as seen below.

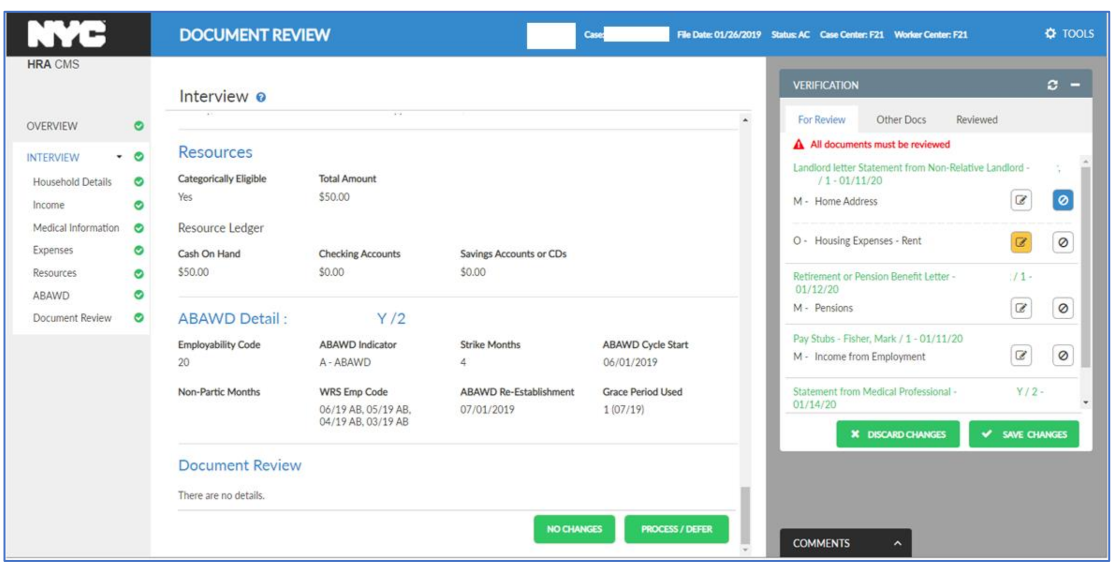


- Clicking the **No Changes Required** button next to the eligibility factor opens the **No changes** dialog window. The Eligibility Specialist must select the appropriate **No Change Reasons**. The system will allow the selection of multiple reasons within this modal window.

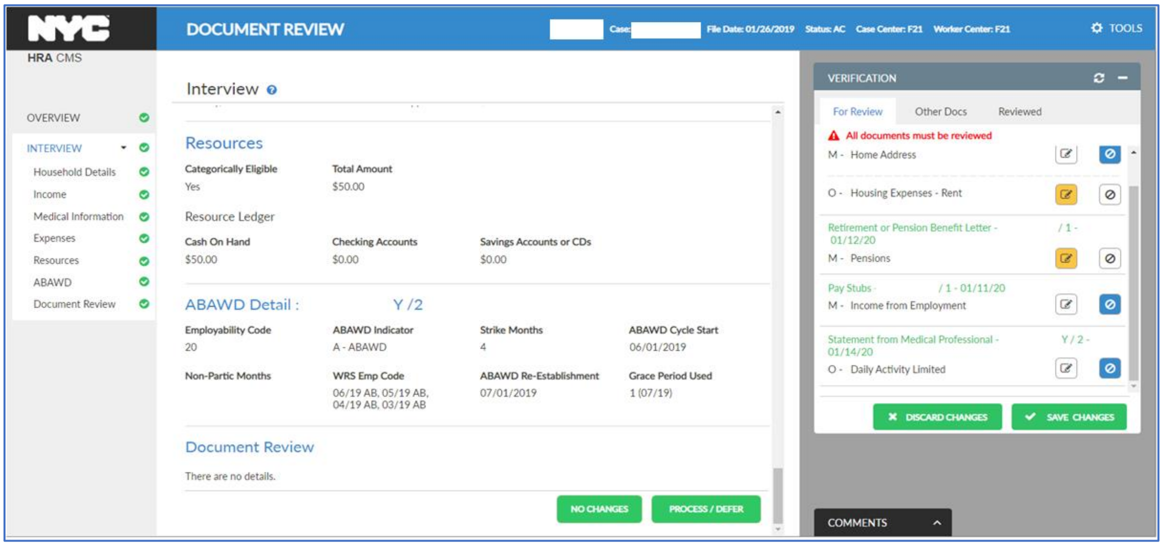


After saving the reasons in the **No Changes** dialog window, the **No Changes Required** button changes from **White**, to **Blue**, as seen on below screen.

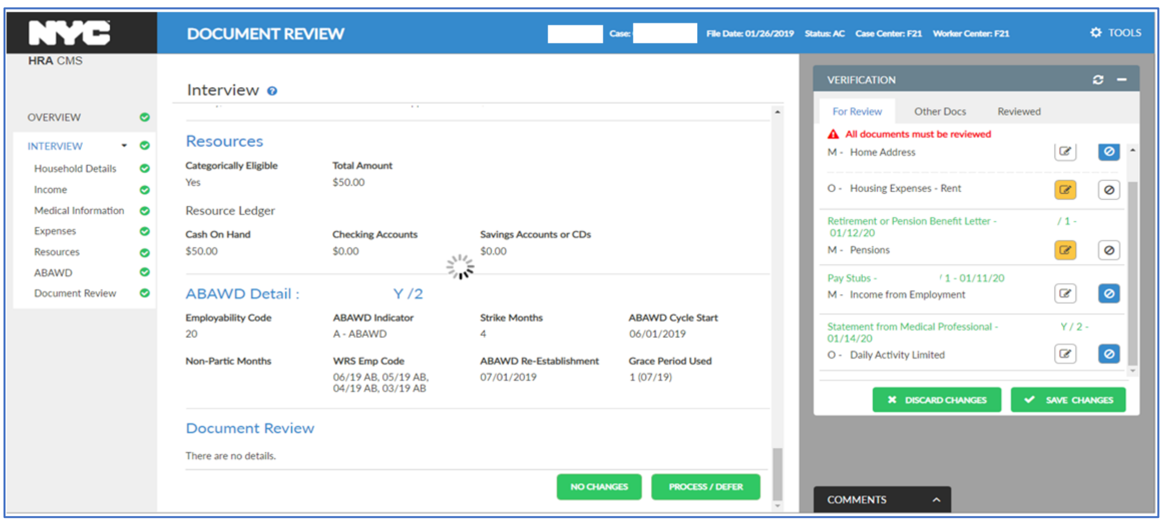
- When it is required to further edit, then selecting the **No Changes Required** button displays the last saved reasons in the **No Changes** dialog.
- Selecting the **Changes Required** button indicates that there is no further action required and therefore changes the color of icon from **White**, to **Yellow** as seen on the below screen.



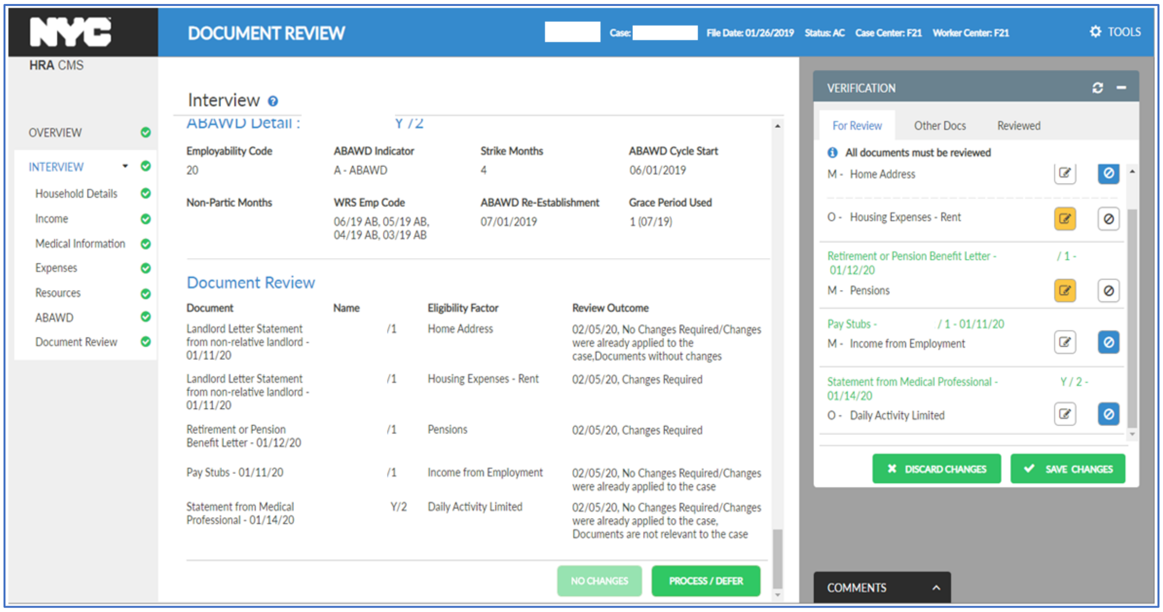
The Eligibility Specialist must review every document within the **For Review** tab. After taking the necessary action of **Changes Required** or **No Changes Required** in the verification widget under the **For Review** tab, the display changes from the default state of white to **Changes (Yellow)** or **No Changes (Blue)**.



- The Eligibility Specialist must click on the **Save Changes** button in the verification widget to save the **Document Review** changes in the system.



This also results in saving the changes in the **Document Review** section of the **Interview Review** screen as seen below.



The Document review section displays the details of **Document Review** such as **Document**, **Name**, **Eligibility Factor** and **Review Outcome** which includes **Review Date**, **Changes Required** or **No Changes Required**, and **No Change Reason(s)**.

No Changes button:

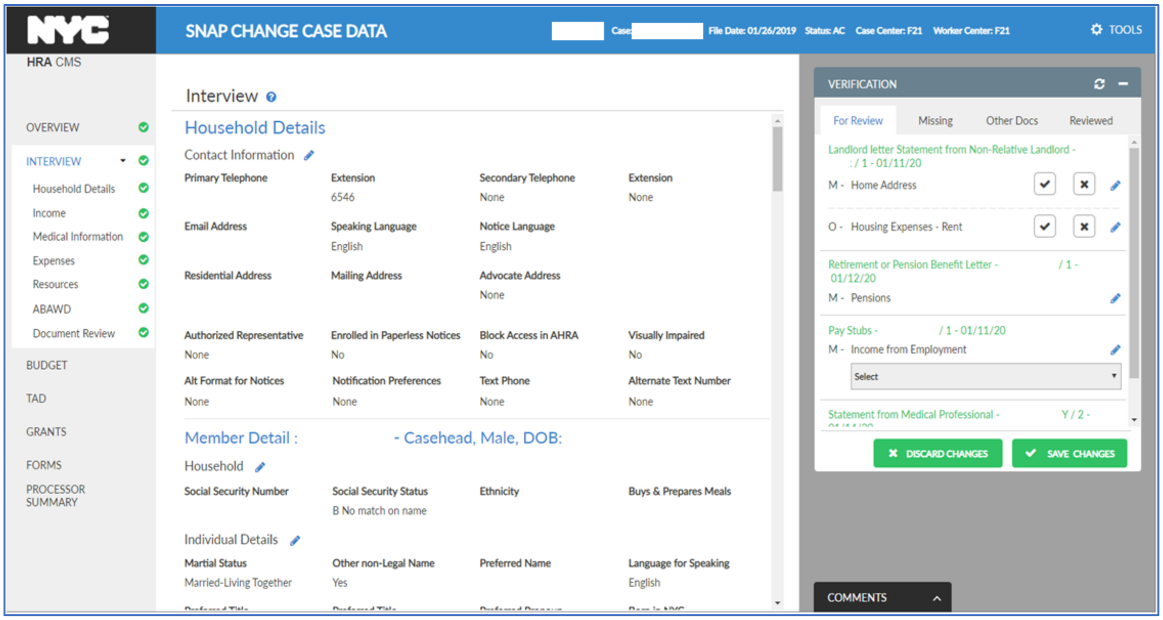
- Disabled when one or more of the eligibility factors marked as **Changes Required**.
- Enabled if all eligibility factors are marked as **No Changes Required**.

Process/Defer button: Always enabled
The following logic drives the display of the **Action** buttons at the bottom of the **Interview Review** screen in **SPOS Document Review** activity:

- The **No Changes** button is available at the bottom of the screen and ends the activity. Upon selection, the Eligibility Specialist is returned to ANGIE.
- A **Process / Defer** button is available at the bottom. This button takes the Eligibility Specialist to the **Interview Review** screen in the **SNAP Change Case Data** activity to allow the Eligibility Specialist to process any changes needed to the case data prior to calculating a budget.
- The Eligibility Specialist can suspend the activity at any time.

<u>**SNAP Change Case Data Activity – Interview Review Screen**</u>

- Selecting the **Process/Defer** button in the **Document Review** Activity results in the system opening up the **SNAP Change Case Data** Activity as seen below.
- The **Interview Review** screen is the default landing screen of the **SNAP Change Case Data** Activity when it navigates from the **Document Review** Activity.



SNAP Change Case Data Activity – SPOS Document Review Section of Interview Review Screen

The contents of the **Document Review** section of the **Interview Review** screen displays the same data/content that were filled out in **Document Review** Activity.

Document Review

Document	Name	Eligibility Factor	Review Outcome
Landlord Letter Statement from non-relative landlord - 01/11/20		Home Address	02/05/20, No Changes Required/Changes were already applied to the case,Documents without changes
Landlord Letter Statement from non-relative landlord - 01/11/20		Housing Expenses - Rent	02/05/20, Changes Required
Retirement or Pension Benefit Letter - 01/12/20		Pensions	02/05/20, Changes Required
Pay Stubs - 01/11/20		Income from Employment	02/05/20, No Changes Required/Changes were already applied to the case
Statement from Medical Professional - 01/14/20		Daily Activity Limited	02/05/20, No Changes Required/Changes were already applied to the case, Documents are not relevant to the case

17. Document Review after Case Closing or Denial

New logic will be added in ANGIE to create a **Document Review** when documents are received after certain rejections or closings. It will be assigned based on the priority order. One of the following events will appear in the **Event Log:**

- Documents received after application denial - review required.
- Documents received after recertification closing - review required.
- Documents received after closing - review required.
- Documents received after periodic report closing - review required.

- For cases that were rejected using the WMS codes **V21** (Failure to Provide Verification), **M20** (Failure to Provide Information During Certification Period [Timely]), **M24** (Failure to Resolve a Computer Match [Adequate]) or **M25** (Failure to respond to a Computer Match Call-In (Timely]) during an Application, when mandated or optional documents are indexed within 60 days of the file date, a Document Review activity will added for assignment based on priority.
  - The following event will appear in the Event Log: Documents received after application denial - review required.
- For cases that were closed using the following WMS codes **Y29** (Failure to Provide Verification-Expedited SNAP [No Notice]), **M20**, **M24** or **M25** during an Application, when mandated or optional documents are indexed within 30 days of the closing, a Document Review activity will added for assignment based on priority.
  - The following event will appear in the Event Log: Documents received after application denial - review required.
- For cases that were closed using the WMS codes **V21**, **M20**, **M24**, **M25**, **M26** (Failure to Provide Verification of Wage Match) or **M27** (Failure to Provide Verification of UIB Match) during a Recertification, when mandated or optional documents are indexed within 30 days of the last day month of the recertification processing month, a Document Review activity will added for assignment based on priority.
  - The following event will appear in the **Event Log**: Documents received after recertification closing - review required.
- For cases that were closed using the WMS closing codes **M20**, **M24**, **M25**, **M26** or **M27** during a case change, periodic report or interim report, when mandated or optional documents that are indexed within 30 days of the closing date, a Document Review activity will added for assignment based on priority.
  - The following event will appear in the **Event Log**: Documents received after closing - review required.
- For cases that were closed using the WMS closing codes **E50** (Failed to Return 6 Month Periodic Report [Timely]), **E51** (Failed to Return 6 Month Periodic Report - Questions [Timely]), **E52** (Failure to Complete 6 Month Periodic Report – Signature [Timely]) and the Periodic Report (**LDSS-4310**) periodic report or the Follow-Up Periodic Report (**LDSS-4310A**) follow-up to the periodic report was indexed for the case within 30 days of the closing, a **Document Review** activity will added for assignment based on priority.
  - The following event will appear in the **Event Log**: Documents received after periodic report closing - review required

In the **Document Review** activity, the Eligibility Specialist must review the documents for compliance and enter a detailed comment indicating whether the case meets the requirements for a reopening:

- If the case meets the requirements for a reopening, click the **No Changes** button in the **Document Review**. Register a new application and link it to the prior case through the application activity.

- If the case does not meet the requirements for a reopening, click the **No Changes** button in the Document Review. No further action is required.

18. SPOS Activity Integration

The following SPOS activities are integrated with ANGIE for the **Application** tasks:

- **Application Interview**
- **Application Modification**
- **ESNAP Decision**
- **FTK Application Interview**
- **EC - Application Interview**
- **EC - ESNAP Decision**
- **EC - FTK Application Interview**
- **Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Make Case Comment**
- **Document Intake**
- **SNAP Intake**

The following SPOS activities are integrated with ANGIE for the **Recertification** tasks:

- **Recertification Interview**
- **EC - Recertification Interview**
- **Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Make Case Comment**
- **Document Intake**

The following SPOS activities are integrated with ANGIE for the **Case Change** tasks:

- **Change Case Data**
- **EC - Change Case Data**
- **Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Make Case Comment**
- **Document Intake**
- **Case Transfer**

The following SPOS activities are integrated with ANGIE for the **Interim Report** tasks:

- **Change Case Data**
- **EC - Change Case Data**
- **Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Make Case Comment**
- **Document Intake**

The following SPOS activities are integrated with ANGIE for the **Periodic Report** tasks:

- **Change Case Data**
- **EC - Change Case Data**
- **Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Make Case Comment**
- **Document Intake**

19. Deferrals for Case Changes and Updates to Priority Logic

ANGIE will be updated to track deferrals for mandated and optional verification using the Notice of Documentation Required – Change in Household Circumstances (**W-132S**) in the **SPOS Change Case Data** activity that are not periodic reports or interim reports:

- When the case is deferred, the task status will move to pending**.**
- For deferrals requesting mandated verification, the task will be marked as ready to assign if all mandated documents are received and indexed before the deferral due date. The date that the full documentation was received becomes the priority date. If the mandated documents are not received by the deferral due date, the priority date will be one day after the deferral due date.
- For deferrals requesting only optional verification, the task will be marked as ready to assign when the optional documentation is received. The priority date is one day after the deferral due date. If no documentation is received, the task will be closed after 45 days.

20. IVRS Recertification Processing

SNAP recertifications are mandated actions for active cases to continue to receive benefits, which occur towards the end of the certification benefit period.

Elderly and disabled recipients can qualify to process their mandated recertification through an Interactive Voice Response System (IVRS). Most successfully completed IVRS recertifications are directly recertified through an interface with NYS, with a few exceptions:

- When there is a WMS match for Social Security Administration (SSA) information or income, the case is marked as “high risk” and the recertification task must be processed by the Family Independence Administration (FIA). The interview for these cases is kept and ANGIE will mark these cases as ready to assign and assign them according to their priority.
- When the case reports a change in their shelter expenses, a deferral process is initiated. The Submit Proof of Your Change in Shelter Expense For Your SNAP Case! (**FIA-1146B**) Form is generated and the task status is marked as pending. Once the deferral due date passes, ANGIE will mark these cases as ready to assign and assign them according to their priority.
- The events for IVRS Recertification processing will be captured in the **Event Log**:
    - Interview SNAP No Change IVRS Complete
    - Pending SNAP No Change IVRS Deferred for Verification
    - Ready to Assign SNAP No Change IVRS Automated CED returned by WMS
    - Ready to Assign SNAP No Change IVRS RFI Hit/High-Risk
    - Processing SNAP No Change IVRS - CED Auto Transmitted
    - Processing SNAP No Change IVRS Processing Complete (auto)

21. Elderly Simplified Application Project (ESAP) Recertification Processing

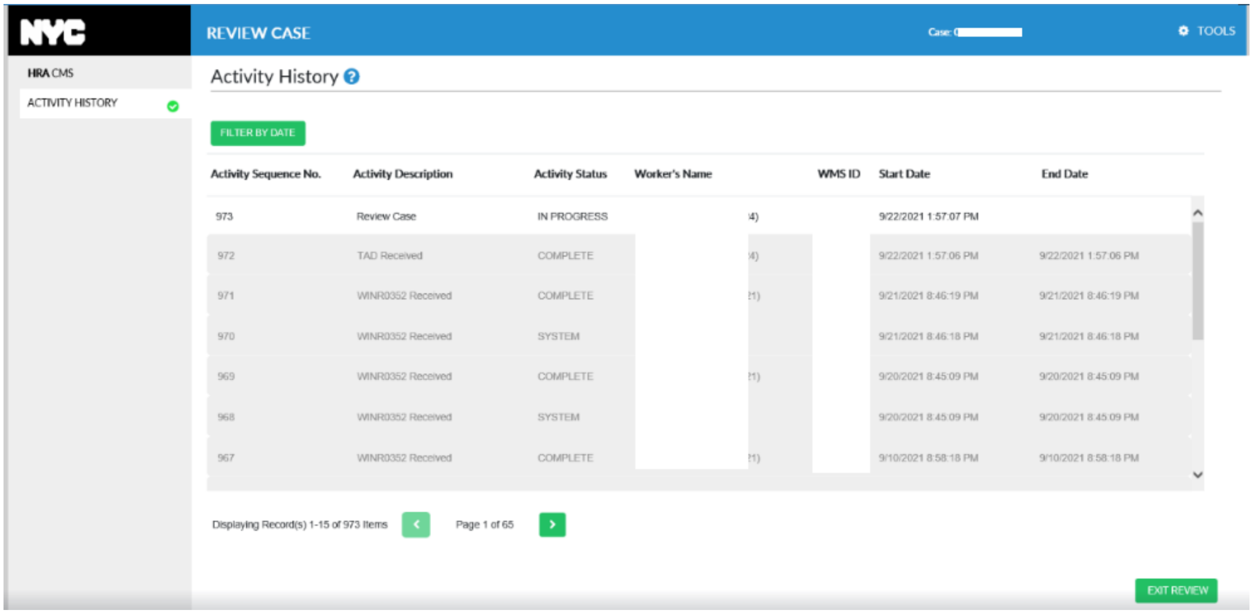
To further improve the participation of older and disabled adults in SNAP, New York has been approved to implement the ESAP process. This project streamlines the SNAP application and verification process for eligible seniors and/or disabled individuals, and to simplify the recertification process, thereby preventing interruptions in the receipt of benefits.

A simplified application/recertification form was created to be used by ESAP households, the Application/Recertification for Supplemental Nutrition Assistance Program (SNAP) Benefits (**LDSS-5166**).

The events for ESAP will be added in the Event Log. ESAP recertifications will be marked as ready to assign when the **LDSS-5166** form is received, when a SNAP Application/Recertification Form (**LDSS-4826**) is received or when an AHRA recertification is received. The submission date will be used as the priority date for the recertification task.

22. SPOS Review Case Update

The Activity History screen was updated to remove the **Archive Data** button.



23. MMAP Priority Logic and Dates for Periodic Reports

Periodic reports are handled by MMAP. New logic will be added in ANGIE for readiness, assignment and processing of these tasks.

Periodic Report Submissions

- Periodic Report submissions from Access HRA for Active SNAP cases for changes will create a **Periodic Report** task in ANGIE. These periodic reports will continue to be de-controlled through the existing ICP-Web process.
  - If there is an open or pending **Case Change** task for FIA, a future **Case Change** task will be scheduled.
  - Cases that do not return the Periodic Report by the due date are closed via ICP WEB.
- Periodic Report submissions from ICP Web for Active SNAP cases for changes will create a **Periodic Report** task in ANGIE after it arrives in the POS database. After these Periodic Reports are received, they will be marked as completed and de-controlled through the existing ICP-Web process.
  - If there is an open or pending **Case Change** task for FIA, a future **Case Change** task should be scheduled.

Priority Logic Rules

Special logic will be added for Periodic Report actions:

- Periodic Report lists are loaded from ICPWEB into POS on a monthly basis.
  - These periodic mailers will appear in ANGIE in **New** status and are not assigned.
  - ICPWEB handles the process for failure to complete the Periodic Report for codes **E50** (Failed to Return 6 Month Periodic Report [Timely]), **E51** (Failed to Return 6 Month Periodic Report - Questions [Timely])and **E52** (Failure to Complete 6 Month Periodic Report – Signature [Timely]). ANGIE will receive these codes in the Notice of Intent (**NOI**) transaction records and will treat them as events. Cases where the Periodic Report is not received by the last day of the Periodic Report Due Date or the report is received with incomplete signatures or section, the Closing becomes effective on the last day of the Periodic Due Month.
- The **Periodic Due Date** in the monthly periodic file is available in POS and loaded to ANGIE when the monthly list is loaded.
- The Periodic Report **Task Due Date** (action due date in ANGIE tables) is the last day of the month, after the month in the periodic report due date.
  - <u>Example:</u> For a Periodic Report due in December, the ANGIE action Due Date will be January 31st.
- The Periodic Report **Ready to Assign** date (RTA date) is the 1st business day of the month that follows the period report date due month.
  - <u>Example:</u> For a periodic report due in December, the RTA date will be January 4th.
- The Periodic Report **Priority Date** will be the **Task Due Date minus 5 business days**.
  - <u>Example:</u> For a Periodic Report due in December, the Priority Date will be January 22nd.
  - Once a case is assigned to the Eligibility Specialist, the Eligibility Specialist will complete a review. If the Eligibility Specialist defers the case using the **W-132S** form, the deferred case is complete once:
    - The supervisor approves the case without WMS transmission <u>OR,</u>
    - There is transmission to WMS and all processing is complete in WMS.

24. MMAP Priority Logic and Dates for Other Case Changes

MMAP works on other case types and will use the **Case Search** to start these actions. Work can be manually assigned via **Case Search** by MMAP Supervisors and Managers for other activity types (**Application Interview**, **Recertification Interview**, **Case Change**, **Document Review**). **Applications** and **Recertifications** follow the same FIA SNAP rules for the MMAP group.

For case changes started by MMAP, the following priority logic rules will be added:

- <u>Initial submission:</u>
  - **Ready to Assign Date**: Activity start date.
  - **Priority Date:** Activity start date plus 5 business days.

        - **Task Due Date:** Activity start date plus 5 business days
- <u>Deferred case (**W-132S** form generated):</u>
        - **Ready to Assign Date:**
            - When all mandated documents are returned before or on deferral due date: **RTA Date = Indexed date of last mandated document received**.
            - Otherwise: **RTA Date** = Deferral Due Date plus 1 business day.
        - **Priority Date:** Deferral Due Date plus 1 business day.
        - **Task Due Date** (action due date): Deferral Due Date plus 5 business days.

Attachment C

Supervisor Role

ANGIE Release 2 Notes

Table of Contents

1. Document Objective

The objective of this document is to provide context on screens for the Supervisor role within the Activity and General Information Exchange (ANGIE). The layout of the ANGIE dashboard for the Supervisor will allow the logical completion of the activities related to the role and consume the necessary information for the role.

2. Summary of Changes in Release 2 (R2)

This document contains the details about new functionality in R2 of ANGIE for Supervisors, including:

- Addition of Supplemental Security Income (SSI) Center (**S15**) and Residential Treatment Center (**S61**).
- Addition of Mailer, Match and Action Program (MMAP).
- Updates to Supervisor dashboards.
- Task prioritization and assignments for Periodic Reports.
- Task prioritization and assignments for Interim reports.
- Recertification approval updates.
- Updates to **Case Search** for approvals.
- Assignment Based on Skillset.
- New Intake list.
- New Streamlined Paperless Office System (SPOS) Intake activity.

1. **S15** and **S61** Processing

Processing for these centers will be added to ANGIE in R2 for the Family Independence Administration Supplemental Nutrition Assistance Program (FIA SNAP):

- FIA's SSI Center is **S15**. Cases at this center have specialized budgeting and rules that require special logic.
- FIA's RTC Center for SNAP (**S61**) includes special processes for RTC applications, case changes and recertification processes. Cases at this center have specialized budgeting and rules that require special logic.

3. Mailer and Match Action Program (MMAP) Processing

FIA's MMAP group will be integrated with the ANGIE system in R2. This group is responsible for processing periodic reports, mandated matches for active SNAP cases, as well as special projects such as Mass Re-Budgeting (MRB) and other such initiatives.

MMAP staff is enrolled in center **F25** with citywide access. The following roles will be integrated for MMAP:

- Eligibility Specialist
- Supervisor
- Manager
- Regional

4. Homepage: Dashboard for the Supervisor

Upon login, the landing screen in ANGIE will be the **Dashboard** page. This screen will allow the Supervisor to view their progress, keep track of their team's progress, access their next priority task and search for cases. It will replace the individual's POS queue.

The screen includes the navigation bar on the left-hand side, the title bar with the Supervisor's name and the **Tools** menu and the main panel with the Supervisor's function. In R2, a new **Intake** link was added in the navigation bar, which opens the new **Intake List**. For additional details on the **Intake** link and activity, please refer to the release notes for the Eligibility Specialists.

Collapsible widgets appear in the Dashboard, showing:

- **Your Work Counts!**
- **Today's Progress**
- **Get Next Case for Sign-off**
- **Case Search**
- **Get Next Case for Processing**

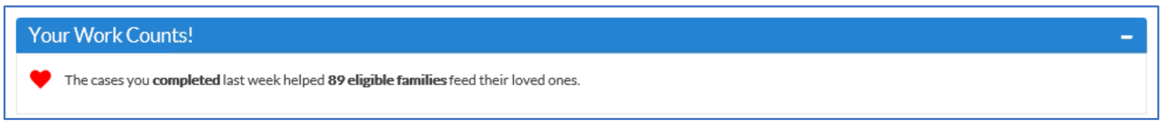
The widgets will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

- Widget Name: The name of the respective widget will be displayed.
- Last Updated: Last updated timestamp on when the data was last updated in the format: Last Updated: **mm/dd/yy hh:mm AM/PM.**
- A refresh button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

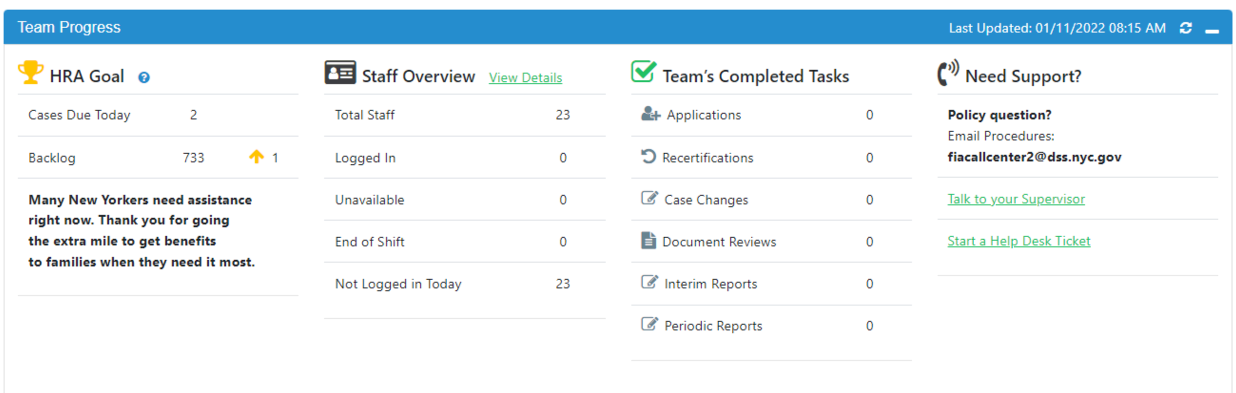
5. "Your Work Counts!" & "Today's Progress" Widgets for Supervisor

The **Your Work Counts!** widget provides positive messages for the Supervisor, with information about how many families their team's work helped in the previous week (first message as seen below) and positive messages from applicants and participants. The positive messages are from applicants/participants and will be pulled from reviews of the Access Human Services Administration (AHRA) mobile app in the App Store / Google Play Store and also from the AHRA site. The comments will be alternating between the first message. The information displayed within this widget gets updated weekly:

- There will be a table with all possible messages that could be displayed from the sources mentioned. This would be a static table that would get refreshed periodically with a new list.
- Each time the Supervisor logs into ANGIE or returns to ANGIE from SPOS, either the “The cases you completed last week helped X eligible families feed their loved ones.” or that day’s HRA message will be displayed. Selection will be random.



The **Today’s Progress** widget for Supervisor consists of four sections including **HRA Goal, Staff Overview**, **Team’s Completed Tasks**, and **Need Support?**. This widget keeps track of the Supervisor’s Team performance throughout the day.



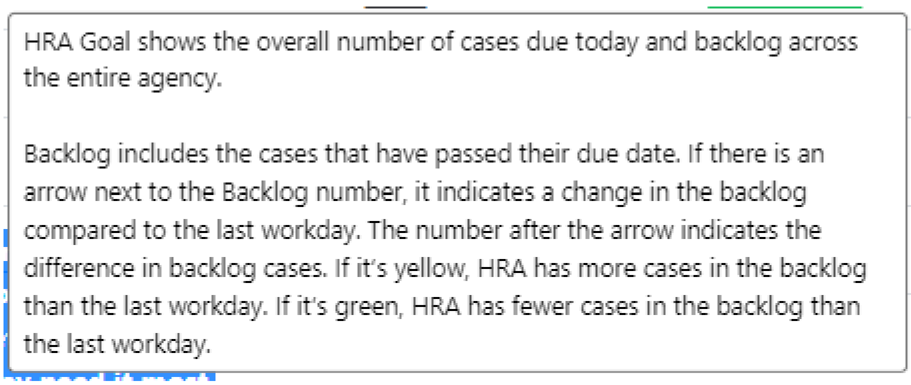
The **HRA Goal** section provides information to the Supervisor on the **Cases Due Today** and **Backlog**:

- **Cases Due Today** displays all tasks with a Priority Date of Today.
- **Backlog** is displayed as the sum of tasks that are late and overdue.
    - Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday.
    - Arrow down (displayed in green) for a decrease in the backlog since yesterday.
    - No arrow at all (just the backlog number) for no increase or decrease in the backlog number. Where there are zero cases in the backlog for more than one day, the number of days that the backlog has been zero will be counted.

- This backlog compares the start of day backlog number from yesterday to the start of day backlog number from today.
- The backlog comparison is calculated at 5:30am each day.
- The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.

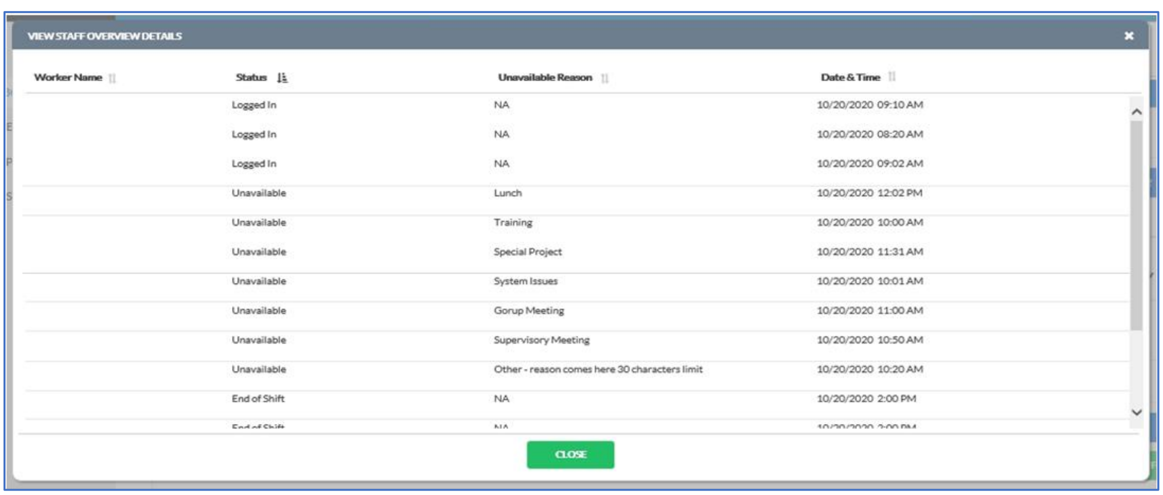
- Below the **Cases Due Today** and **Backlog**, there will be text indicating: “Many New Yorkers need assistance right now. Thank you for going the extra mile to get benefits to families when they need it most”.

Help Text displayed for HRA Goal:


HRA Goal shows the overall number of cases due today and backlog across the entire agency.

Backlog includes the cases that have passed their due date. If there is an arrow next to the Backlog number, it indicates a change in the backlog compared to the last workday. The number after the arrow indicates the difference in backlog cases. If it's yellow, HRA has more cases in the backlog than the last workday. If it's green, HRA has fewer cases in the backlog than the last workday.

The **Staff Overview** section provides information to the Supervisor on their **Total staff**, **Logged in**, **Unavailable**, **End of Shift**, and **Not logged in Today**. The Supervisor can get more details in terms of the Worker Name, Status, Unavailable Reason, and Date & Time by selecting the **View Details** link located in this section to see the screen below.


VIEW STAFF OVERVIEW DETAILS

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM

CLOSE

The **Team’s Completed Tasks** section displays the number of Applications, Recertifications, Case Changes, Document Reviews, Periodic Reports, and Interim

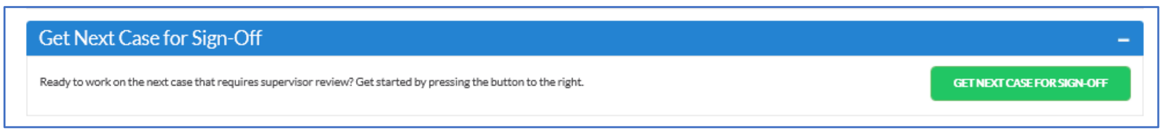
Reports the Supervisor's team completed for that day up to the point in which the timestamp is shown in the banner.

The **Need Support?** section provides the email for the Office of Procedures FIA Call Center (fiacallcenter2@dss.nyc.gov) as read-only.

- Clicking on **Talk to your Supervisor** opens **Microsoft Teams**.
- Clicking on **Start a Help Desk Ticket** opens the **Self-Service Incident Form** and allows the staff to report any technical issue they may encounter in ANGIE.

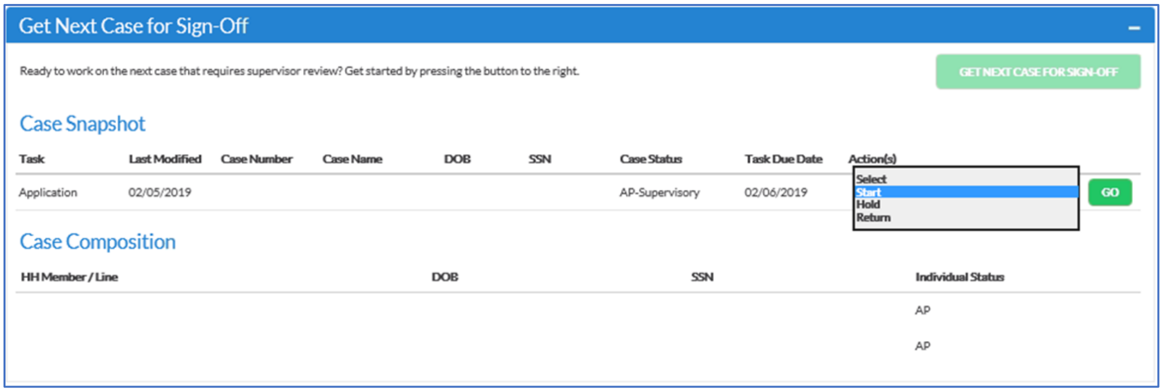
6. Get Next Case for Sign-off: Next Approval Task for Supervisor

The Supervisor will get the next task to approve by selecting the **Get Next Case for Sign-off** button located within the dashboard. The approval tasks that are distributed to the Supervisor will be based on the priority logic.



Once the button is pressed, the Supervisor will be displayed with a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for the **Case Snapshot** section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date,** and **Action(s)**. The columns for the **Case Composition** section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.

- The Supervisor will be able to start the **Approval** task by selecting the **Start** option within **Action(s)** dropdown, and then selecting the **GO** button. The ANGIE system will then launch the SPOS application for the Supervisor to approve the respective task.
- In R2, the **Task** column was updated to provide additional detail about the assigned work. For example, it will inform the Supervisor if the assigned task is an error correction.
- Previously, it only informed the Supervisor that an application, recertification, change case or document review task was assigned.



In R2, two new task types will be added for sign-off:

- Periodic Report – Cases in Active status (**AC**) that must complete a mandated periodic report.
- Interim Report – Cases in AC at center **S15** that must complete a mandated interim report.

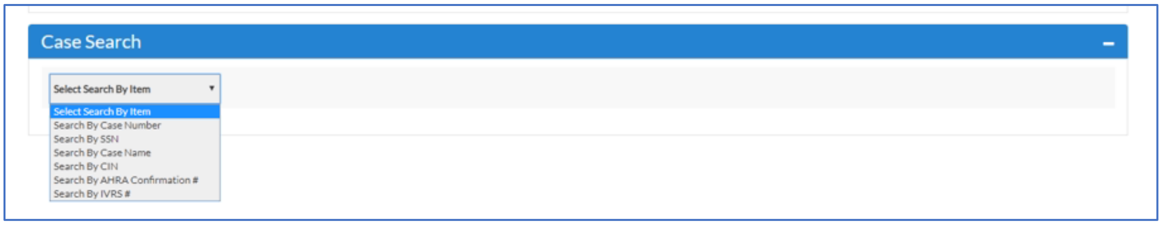
Periodic Reports
Monthly lists of cases due for a periodic report are received from the Welfare Management System (WMS) and will be loaded into ANGIE. ANGIE will track the submission of the online periodic report and indexing of the periodic mailer forms that make cases ready for sign-off, in order to assign the tasks to MMAP supervisors based on the priority and due dates.

Interim Reports
Monthly lists of **S15** cases due for an interim report are received from WMS and will be loaded into ANGIE. ANGIE will track the indexing of the interim report forms that make cases ready for sign-off, in order to assign the tasks to FIA SNAP supervisors based on the priority and due dates.

7. Case Search: Manual Assignment of Tasks

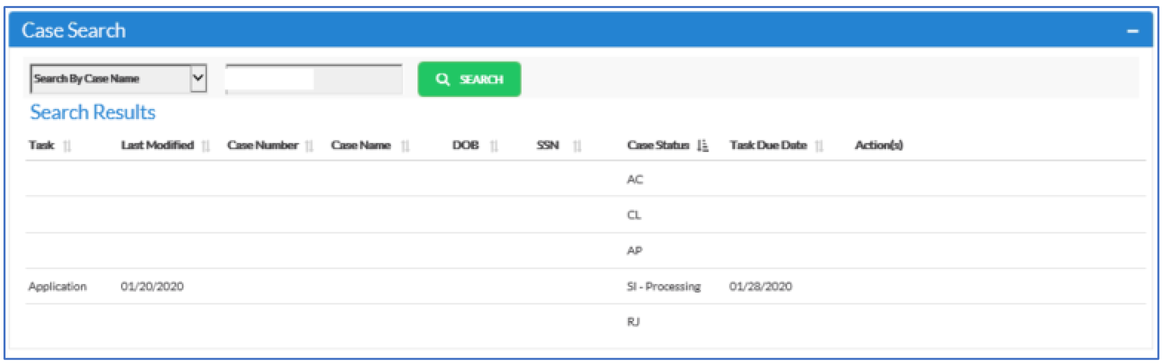
To manually assign a task, the Supervisor must first search for the respective case. The Supervisor can execute a search based on the following criteria:

- **Case Number**
- **SSN**
- **Case Name**
- **CIN**
- **AHRA Confirmation #** (Access Human Resources Administration)
- **IVRS #** (Interactive Voice Response System for Recertifications)



Based on the criteria selected from the dropdown, the Supervisor will be required to enter the corresponding information.

- Upon selecting the **Search** button, the system will display the search results consisting of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date** and **Action(s)**.



- Selecting the desired row will highlight that row. Once the desired row is selected, the Supervisor can select from available options from the **Action(s)** dropdown and select **Go** to execute. The options available within the **Action(s)** dropdown are dependent on the **Case Status** of the Search result. The search process can result in the following three outcomes:

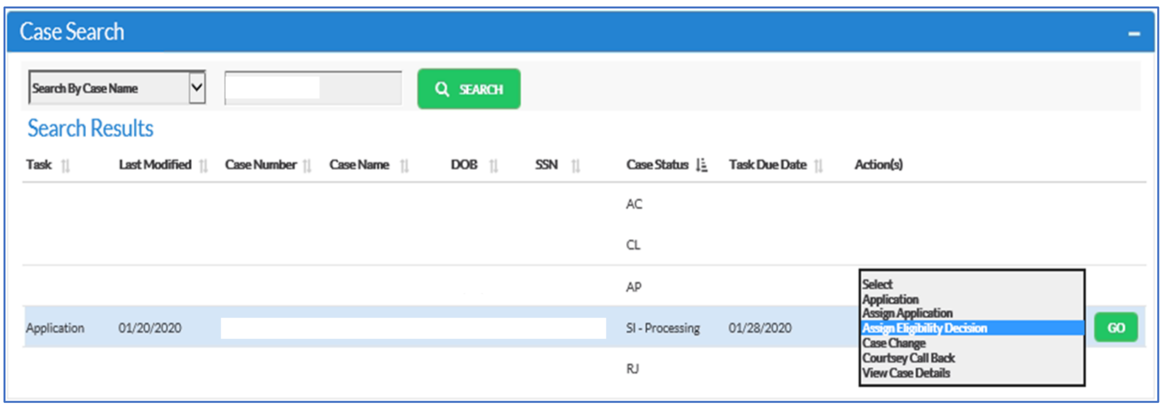
(1) **Open Task**
- Cases with **open task** shall have information in **Task** and **Last Modified** columns of **Search Results** section
- If the system finds a case with **open task**, it will display this case first in the **Search Results** section
- If the system finds multiple cases with **open tasks**, it will display these cases first and they will be sorted by earliest date in the **Task Due Date** column

(2) **Latest Task**
- If the system does not return any cases with **open tasks** in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
- Cases without open task are those where these is no information in the **Task** and **Last Modified** columns of the **Search Results** section

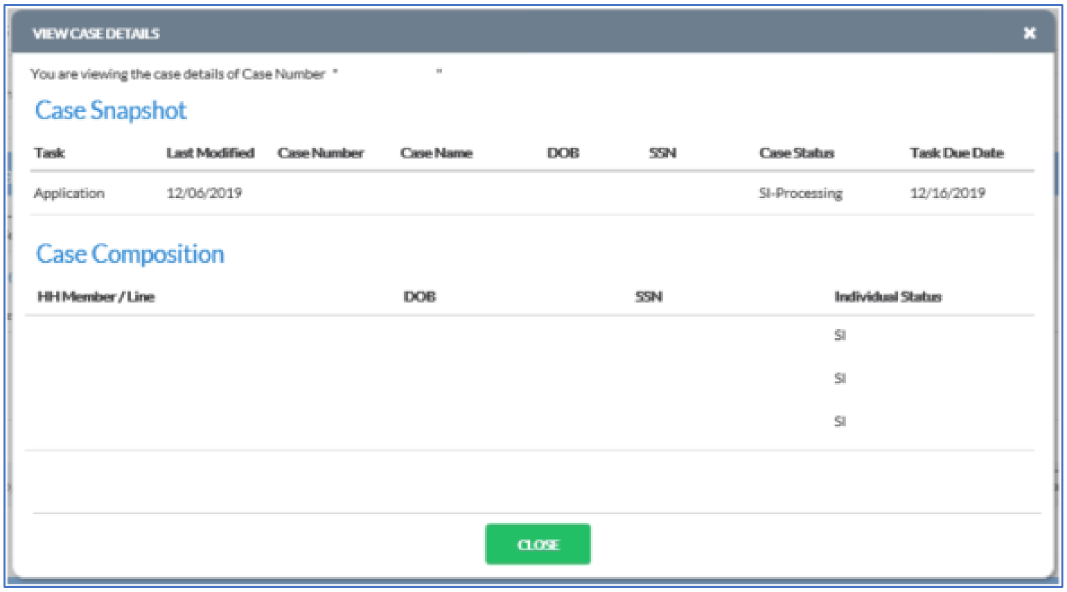
(3) **No Task**
- The system displays the message “No Case found, please refine your search criteria.”

The **Search Results Actions(s)** drop-down menu will contain a list of available actions for the Supervisor. These actions will be table-driven. These tables allow control at the following levels:

- Role of Supervisor (there are many titles within 1 role) - SPOS roles will be leveraged to maintain compatibility with POS queues.
- Center designation of the Supervisor.
- Current Welfare Management System (WMS) case status of the selected case in search results.
- List of activities available for the case, based on the case status and open task.

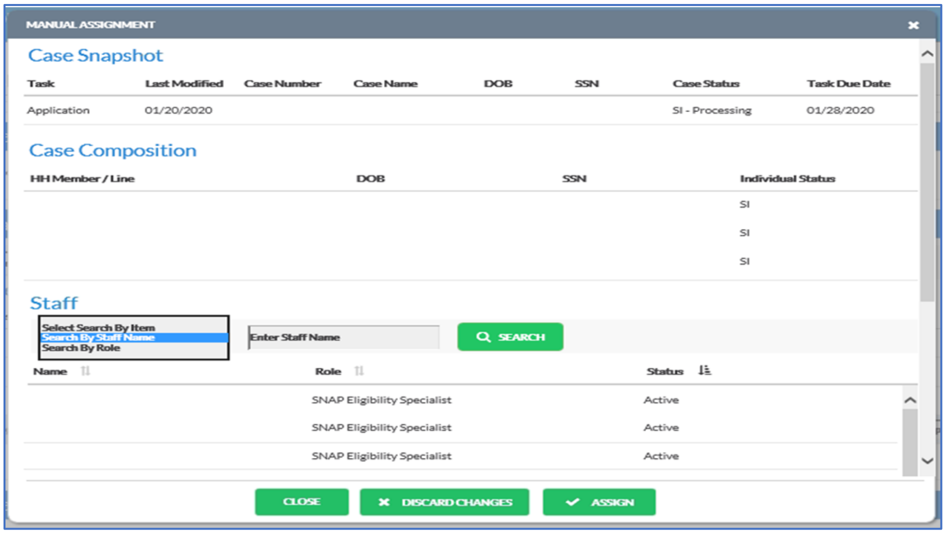


- Selecting the **View Case Details** option from Action(s) and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.

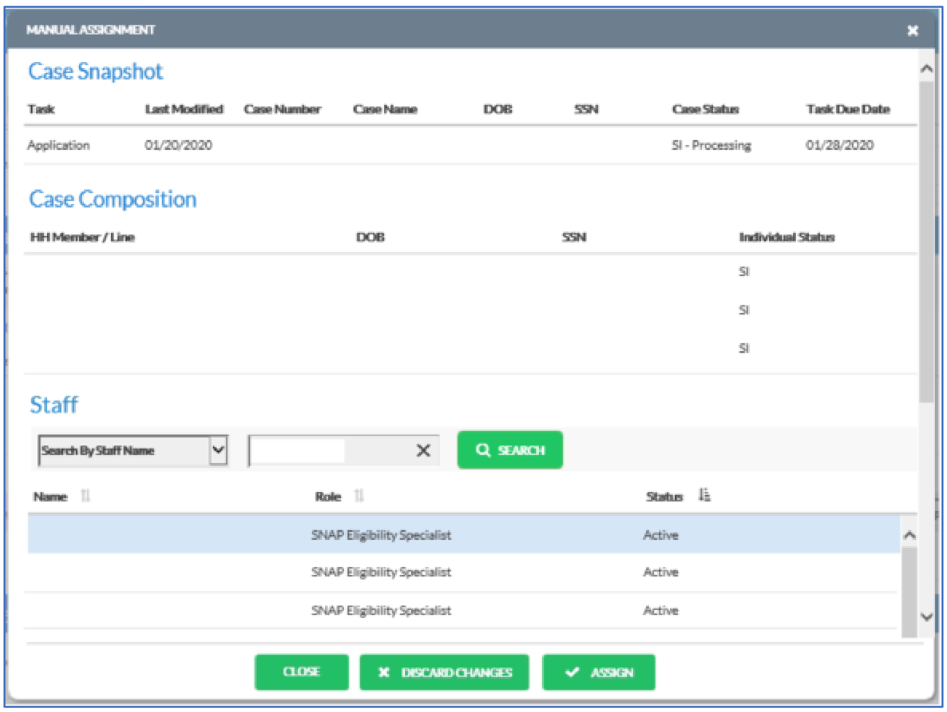


The Supervisor can manually assign tasks by searching for the case and then selecting the **Assign** option from the **Actions** dropdown.

- Selecting the **Go** button results in a modal window displaying the **Case Snapshot**, **Case Composition**, along with the **Staff** section as seen below. The columns for the **Case Snapshot** section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**. The columns for the **Case Composition** section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status.** Within the Staff section, the Supervisor can search for the Staff based on **Staff Name** or **Role** and then select the intended staff within the grid. If Name is selected, then the Supervisor is required to enter the name as seen below. If Role is selected, the Supervisor is required to select an option from the **Role** dropdown consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, or **Clerical Associate**. Selecting the **Search** button will display the search results in the grid. The sortable columns displayed in the Staff section include **Name**, **Role**, and **Status**.



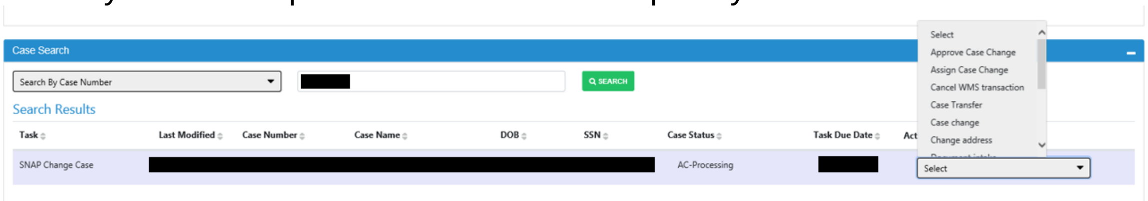
- Once a row is selected for the intended staff, it will highlight that row and selecting the **Assign** button will assign the task to that staff.



A green banner will be displayed to inform the Supervisor that the task has been successfully assigned.

8. Case Search: Search for Pending Approvals

The supervisors will be able to search for pending approvals in the **ANGIE Case Search** and will be able to start the approvals. This will allow for sign-off of cases that may need to be processed ahead of their priority order.



9. Case Search: New Warning Messages for Duplicate Activities

When staff selects an activity other than **Review Case** and **View Details** in **Case Search,** ANGIE will confirm whether the same activity was already completed as part of the current task when the **Go** button is clicked and before launching SPOS.

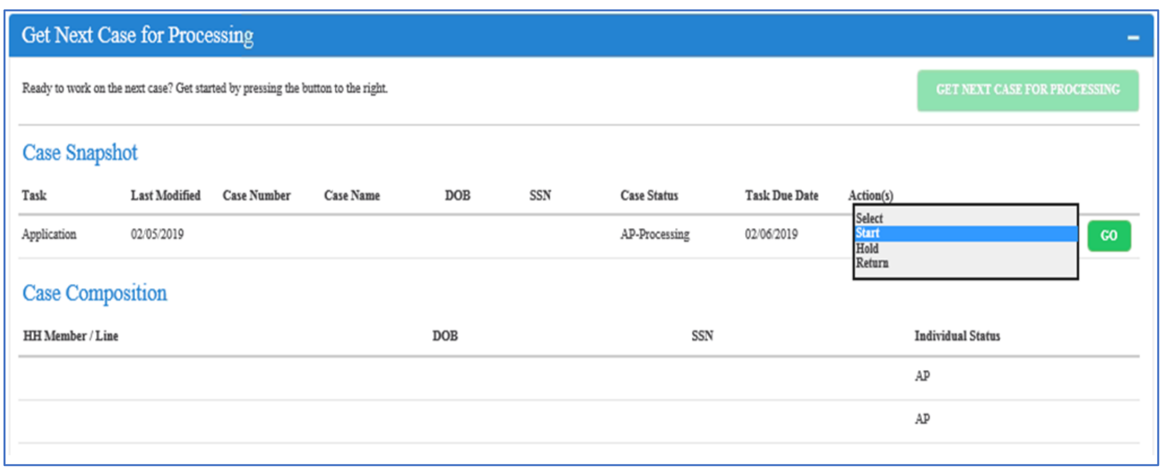
- If the same activity was already completed in the current task, ANGIE will display the following warning message: “This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?”
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the **Case Search** will be reset.
- For recertification tasks, if the recertification due date is more than four months in the future, ANGIE will display the following warning message: “This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?”
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the **Case Search** will be reset.
- If there was a transmission to WMS on the current day from SPOS, then ANGIE will display the following warning message: “There was a transmission to WMS for this case today. You may be starting a duplicate activity. Continue to SPOS?”
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the **Case Search** will be reset.

10. Get Next Case for Processing for Supervisor

The Supervisor can step down to the role of the Eligibility Specialist and function as an Eligibility Specialist. The tasks that are distributed to Supervisors within this widget, are non-approval tasks. This function will allow the Supervisor to help the Eligibility Specialists perform their tasks when additional person power is needed.

- Selecting the **Get Next Case for Processing** button located within the dashboard will systemically assign a non-approval task based on the priority logic.

- Once the button is clicked, the Supervisor will be displayed with a case profile consisting of **Case Snapshot** and **Case Composition** as seen below. The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date** and **Action(s)**. The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.
- The Supervisor will be able to start the task by selecting the **Start** option within **Action(s)** dropdown, and then selecting the **GO** button. The ANGIE system will then launch the SPOS application for the Supervisor to work on the respective task.
- In R2, the **Task** column was updated to provide additional detail about the assigned work. For example, it will inform the staff if the assigned task is an error correction.
    - Previously, it only informed the staff that an application, recertification, change case or document review task was assigned.



In R2, two new task types will be added:

- Periodic Report – Cases in AC that must complete a mandated periodic report.
- Interim Report – Cases in AC at center S15 that must complete a mandated interim report.

Periodic Reports
Monthly lists of cases due for a periodic report are received from the Welfare Management System (WMS) and will be loaded into ANGIE. ANGIE will track the submission of the online periodic report and indexing of the periodic mailer forms that make cases ready for processing, in order to assign the tasks to MMAP staff based on the priority and due dates.

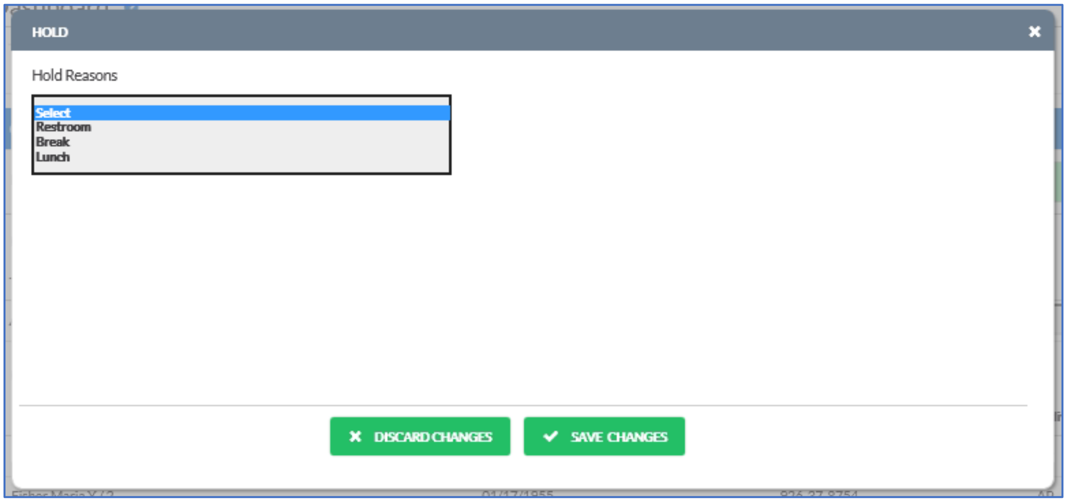
Interim Reports
Monthly lists of **S15** cases due for an interim report are received from WMS and will be loaded into ANGIE. ANGIE will track the indexing of the interim report forms that make cases ready for processing, in order to assign the tasks to FIA SNAP staff based on the priority and due dates.

11. Hold or Return Task

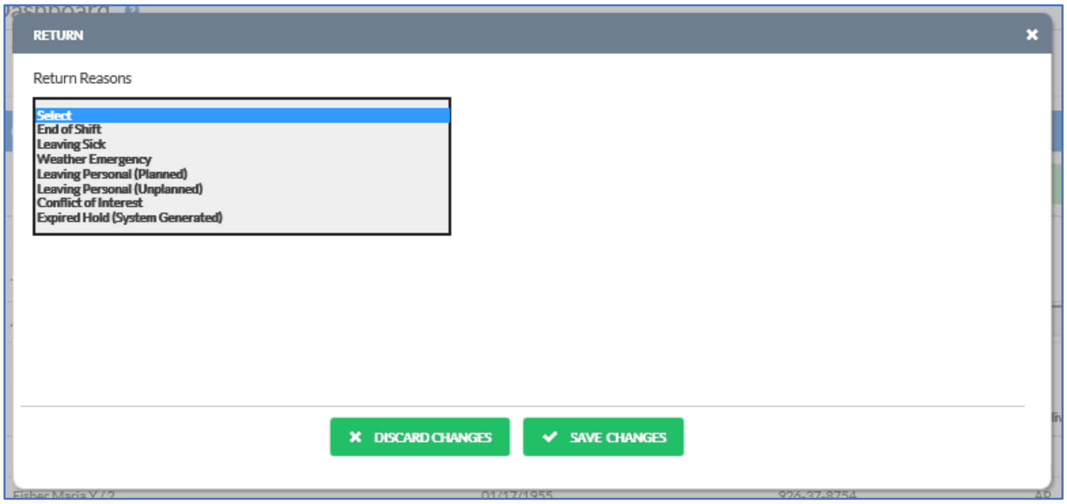
The Supervisor can execute a **Hold** or **Return** on a task and is applicable to both the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets.

- The Supervisor can execute a hold on a task by selecting the **Hold** option from the Action(s) dropdown and selecting the **Go** button. The Supervisor will be displayed with a modal window and is required to select from the available Hold Reasons (**Restroom**, **Break**, **Lunch**). Once the Supervisor selects the applicable hold reason and then selects **Save Changes,** the hold will be applied on the respective task for a set time (2 hours), for that Supervisor.

Note: The Supervisor cannot work on another "prioritized task" until the hold task is worked on. If the Supervisor returns within the set time, the Supervisor will be provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task will be placed back in the general pool and another Supervisor may have access to that task.



- The Supervisor can return a task by selecting the **Return** option from the Action(s) dropdown and selecting the **Go** button. The Supervisor will be displayed with a modal window and is required to select from the available Return Reasons (**End of Shift**, **Leaving Sick**, **Weather Emergency**, **Leaving Personal (Planned)**, **Leaving Personal (Unplanned)**, **Conflict of Interest**, **Expired Hold (System Generated)**).
- After selecting the applicable return reason and selecting the **Save Changes** button, the task will be returned to the general pool and another Supervisor can get the task.



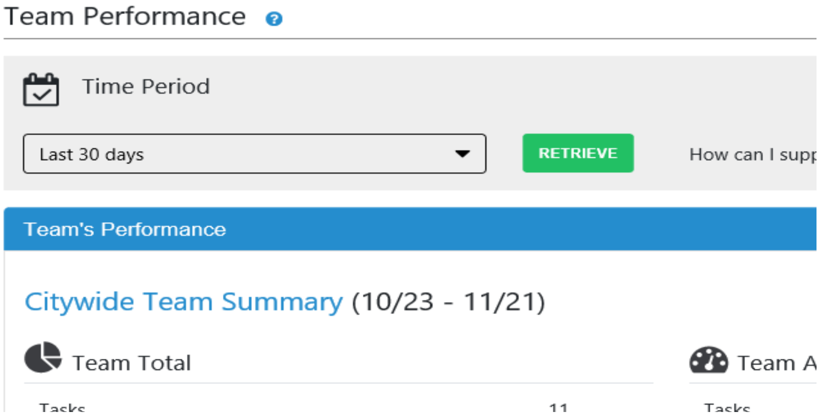
12. Team Performance Page for Supervisor

The Supervisor can access their **Team Performance** page from the left navigation pane. This page will provide metrics to gage the team's performance. In R2, information about supervisor returns was added.

The page consists of the **Timeframe Selector,** the **Accuracy – WMS Error Rate** widget and the new **Accuracy – Supervisor Returns** widget as seen below.

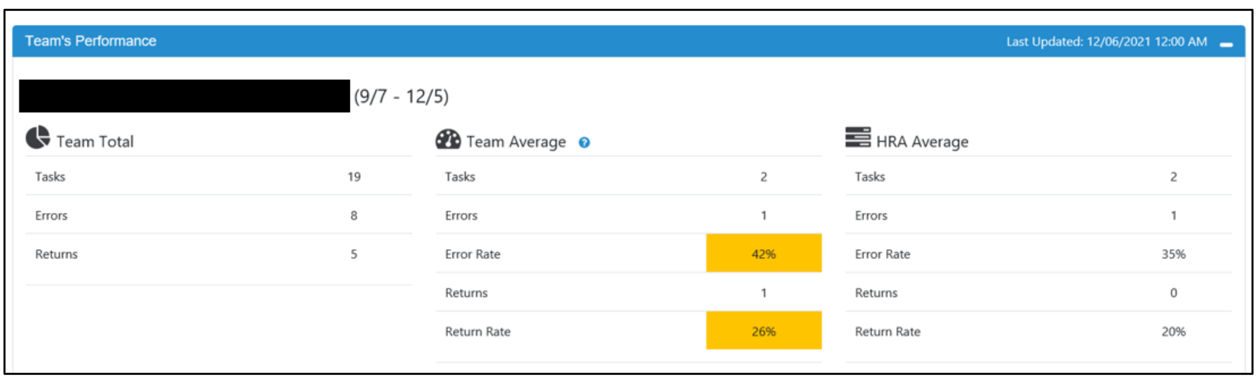
The supervisor is required to select the timeframe for the report to generate and can choose from **Last 7 Days**, **Last 30 Days**, **Last 90 Days** or **Last 180 days**.

- Once the desired timeframe is selected, selecting the **Retrieve** button will display the corresponding results.



The **Team's Summary** section of the page consists of three tables consisting of **Team Total**, **Team Average**, and **HRA Average**:

- Each table provides the number of **Tasks**, the number of **Errors**, the **Error rate** as a percentage, the number of **Returns**, and the **Return rate** as a percentage.
- The **Error Rate** for the **Team Average** table will be displayed within green box, yellow box, or blue box to indicate if the team's WMS Error Rate is above, below, or same as the HRA Average respectively.
- The **Return Rate** for the **Team Average** table will be displayed within green box, yellow box, or blue box to indicate if the team's Supervisor Return Rate is above, below, or same as the HRA Average respectively.



The **Staff Detail** section of the page will contain information on all the staff that reports to the respective Supervisor and includes **Worker Name**, **Tasks**, **Errors**, **Error Rate**, **Returns** and **Return Rate**.

- Colored icons are displayed to the left of the Worker Name to provide context on staff that are performing exceptionally well (green star) or performing poorly (yellow warning).
- The **Errors** and **Error Rate** values are links for the **WMS Error Rate** widget for the respective Eligibility Specialist, while the **Returns** and **Return Rate** values are links for the **Supervisor Return** widget for the respective Eligibility Specialist.

The Supervisor can click on these links to view the Performance details of the selected Eligibility Specialist.

- The name of the respective Eligibility Specialist will be displayed on the popup widgets.

[redacted]

Worker Name	Tasks	Errors	Error Rate	Returns	Return Rate
[redacted]	2	1	50%	1	50%
[redacted]	0	0	0%	1	0%
[redacted]	2	1	50%	1	50%
[redacted]	11	4	36%	1	9%

The Eligibility Specialist view will contain the name of the selected Eligibility Specialist on the widgets **Accuracy – WMS Error Rate** and **Most Common WMS Errors**.

The **Accuracy - WMS Error Rate** widget provides Error Rates on the **Applications**, **Recertifications**, **Case Changes**, **Interim Reports and Periodic Reports** worked on by the selected Eligibility Specialist for the set timeframe. It provides information on the selected Eligibility Specialist's performance in terms of their own **Error Rate** (displayed within **My WMS Error Rate**), HRA Average Error Rate (displayed with **HRA Average**), and keeps track of the Eligibility Specialist's current Error Rate over the previous period (displayed within **My Change Over Time**).

My WMS Error Rate column:

- At the header level, the actual dates for the timeframe selected is displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- If the Eligibility Specialist's error rate for the selected period is less than 1 Standard Deviation above the HRA mean, the header shall read **Top Performer** colored in a green color block.
- If the Eligibility Specialist's **Error Rate** for the selected period is within one Standard Deviation of the HRA mean, the header shall read **Meeting Expectations** colored in a blue color block.
- If the Eligibility Specialist's **Error Rate** for the selected period is more than one Standard Deviation below the HRA mean, the header shall read **Area for Growth** colored in a yellow color block.

HRA Average column:

- At the header level, the actual dates for the selected time period is displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Shows the average **WMS Error Rate** for all other Eligibility Specialists for the selected time across each Task Type (Applications, Recertifications, and Case Changes)

My Change over Time column:

- At the header level, the actual dates for the previous time period are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd]
- If this period's **Error Rate** is below that of the last period, there will be a green arrow pointing downwards, followed by the change in percent.
- If this week's **Error Rate** is the same from the last week, it will only display "0%".
- If this week's **Error Rate** is above that from the last week, there will be a yellow arrow pointing upwards, followed by the change in percent.

My Most Common WMS Errors widget has a summary table of the selected Eligibility Specialist's most common Errors. The table consists of two columns. The **Error Code** column shows the name of the WMS Error(s). The **# of Errors** column shows the count of the number of corresponding **WMS Errors** the Eligibility Specialist had for the previous week. Both columns are sortable.

- Selecting **Close** will return to the **Team Performance** page of the Supervisor.

Accuracy-Supervisor Returns widget

- The **Accuracy – Supervisor Returns** widget displays comparative information as measured in respect to performance of other HRA staff in the same role and in the same time period, as compared against the Eligibility Specialist's overall performance from the previous time period.
- The Header of **Accuracy-Supervisor Returns** widget consists of the following:
  - **Widget Name**: The name of the respective widget is displayed.
  - **Help Text** Icon: Upon selection will display the corresponding help text for this widget.
  - **Last Updated**: Last updated timestamp on when the data was last updated.
  - A button to minimize or maximize the widget.

Task column:

- This column consists of the row-headers of **Applications**, **Recertifications**, **Case Changes**, and **Periodic/Interim**. It should be noted that periodic report and interim report data are combined into this one row.

My Supervisor Returns column:

- This column displays the Eligibility Specialist's **Supervisor Returns** for the selected timeframe for each of the Task Types:
- At the header level, the actual dates for the timeframe selected is displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Supervisor Returns **Calculation**: Both the numerator and the dominator must occur within the timeframe in order to be part of the **Supervisor Returns** Calculation.
    - The **Supervisor Returns** is displayed as a percentage.
    - If the Eligibility Specialist did not perform any tasks (0 tasks) for the selected time period (e.g. The Eligibility Specialist did not do any Case Changes in the Last 7 Days [selected period], and only worked on Applications, Recertifications, Periodic/Interim), **N/A** is displayed across Case Changes row. In this example, Applications, Recertifications, Periodic/Interim will have Error Rates across the rows.
- Depending on the **Supervisor Returns** comparison to the HRA Average, the following depictions are used:
    - If the Eligibility Specialist's **Supervisor Returns** for the selected period is less than the HRA Average, the header will read **Top Performer** colored in a green color block.
    - If the Eligibility Specialist's **Supervisor Returns** for the selected period is the same as the HRA Average the header will read **Meeting Expectations** colored in a blue color block.
        - The following informational text is displayed upon hovering over the "Meeting Expectations" label: "You're in the average range for all HRA staff in your role."
    - If the Eligibility Specialist's **Supervisor Returns** for the selected period is greater than the HRA Average, the header will read **Area for Growth** colored in a yellow color block.

HRA Average column:

- The column displays the average **Supervisor Returns** Rate for all other Eligibility Specialists for the selected time across each Task Type.

- At the header level, the actual dates for the selected time period is displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd].

My Change Over Time column:

- This column displays the Eligibility Specialist's change in **Supervisor Returns** Rate from the previous time period (based on the time frame selection) to this time period across each Task Type.
- At the header level, the actual dates are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd]
- If this period's **Supervisor Returns** Rate is better than the last period, there is a green arrow pointing downwards, followed by the change in percent.
- If this period's **Supervisor Returns** Rate is the same from the last period, it will only display "0%".
- If this period's **Supervisor Returns** Rate is worse than last period, there is a yellow arrow pointing upwards, followed by the change in percent

<u>Supervisor Return by Section Widget</u>

- The **Supervisor Returns by Section** is displayed after the **Accuracy – Supervisor Returns** chart**.** It includes a table of two sortable columns of **Case Section** and **# of Returns**:
- **Case Section** column: This column displays the same sections as the Supervisor disapproval mechanism. For example, if "Expenses" is one Supervisor disapproval section, then only Expenses should be displayed on this table (along with the count of Supervisor Returns for Expenses). However, if Expenses is broken up into Heat, Rent, etc., then the individual components should be listed (along with the count of Supervisor Returns for the respective sub-section).
- **# of Returns** column: This column shows the count of the number of corresponding Supervisor Returns the Eligibility Specialist has for the respective SPOS Case Section.

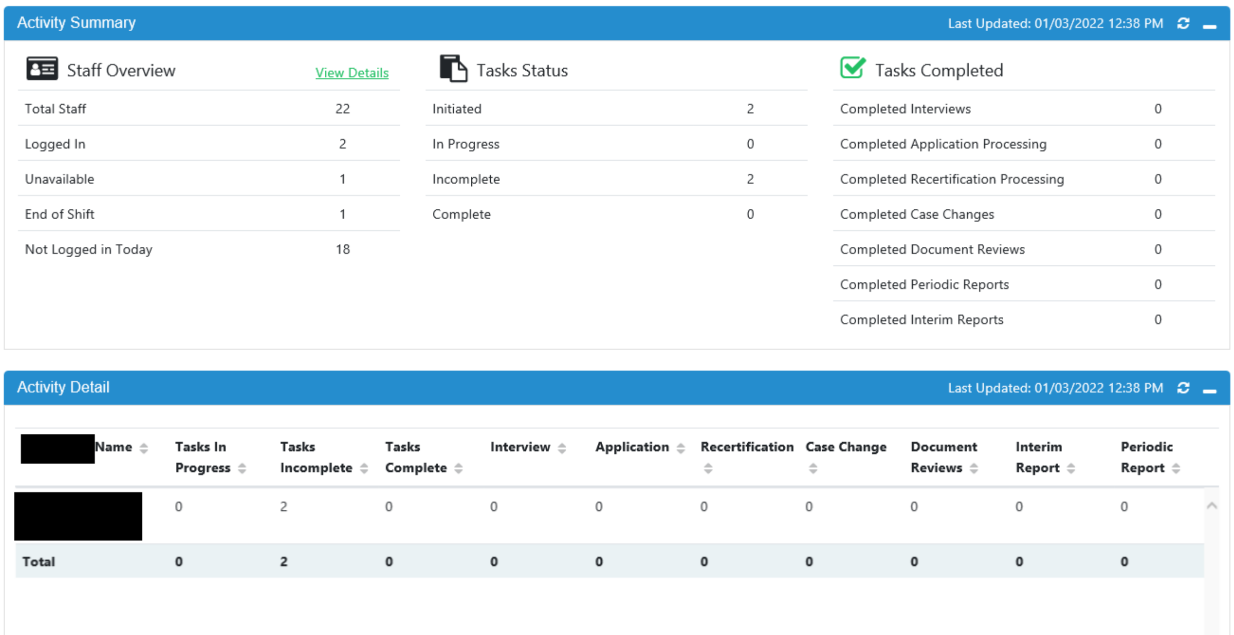
13. Team's Daily Activity for Supervisor

The Supervisor can access their **Team's Daily Activity** for the specific day from the left navigation pane. This page provides the Supervisor with a summary of their team's daily activity as a snapshot of their work for a specific day, so that the supervisor can be more informed of their team's daily activity.

The **Activity Summary** widget consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the **Total Staff**, **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. The **Tasks Status** table provides information on the number of tasks that are Initiated, **In**

Progress, **Incomplete**, and **Complete**. The **Tasks Completed** table provides the number of tasks that are completed for **Interviews**, **Applications, Recertifications**, **Case Changes**, **Document Reviews**, **Periodic Reports** and **Interim Reports**.

- In the **Tasks Completed** section, the labels were updated to add the word **Completed** before each task type and **Completed Periodic Reports** and **Completed Interim Reports** were added.
- In the **Activity Detail** section, the **Interim Report** and **Periodic Report** task types were added.



Activity Summary — Last Updated: 01/03/2022 12:38 PM

Staff Overview (View Details)	
Total Staff	22
Logged In	2
Unavailable	1
End of Shift	1
Not Logged in Today	18

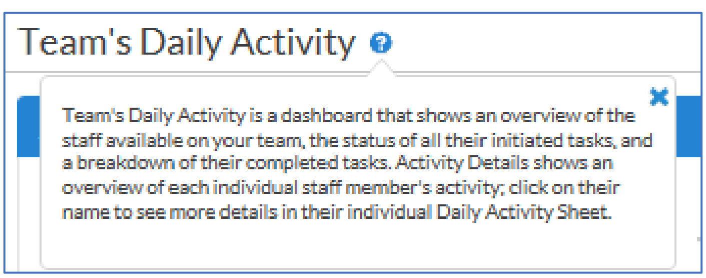
Tasks Status	
Initiated	2
In Progress	0
Incomplete	2
Complete	0

Tasks Completed	
Completed Interviews	0
Completed Application Processing	0
Completed Recertification Processing	0
Completed Case Changes	0
Completed Document Reviews	0
Completed Periodic Reports	0
Completed Interim Reports	0

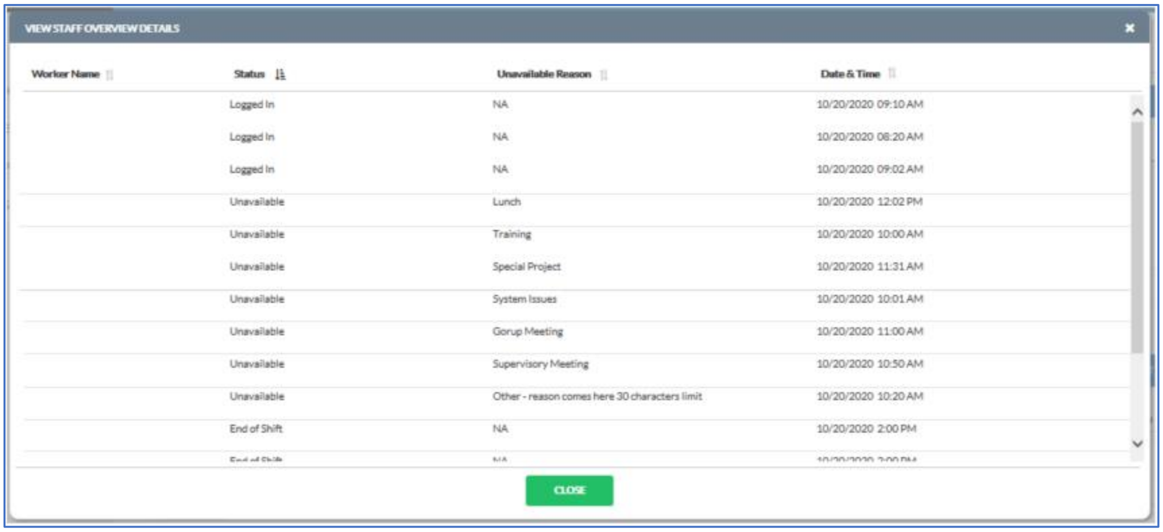
Activity Detail — Last Updated: 01/03/2022 12:38 PM

[redacted] Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews	Interim Report	Periodic Report
[redacted]	0	2	0	0	0	0	0	0	0	0
Total	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

Help Text for the Team's Daily Activity page:



A **View Details** link is provided within the Staff Overview table that will provide details of staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. The modal window that displays is seen below.



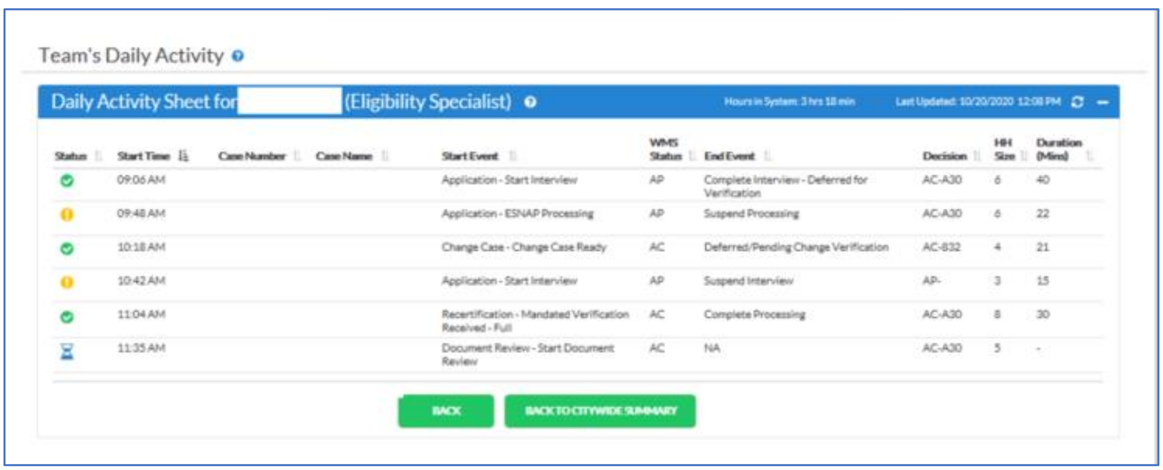
VIEW STAFF OVERVIEW DETAILS

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM

CLOSE

The **Activity Detail** widget displays a table containing information relating to all of the Eligibility Specialists that report to the respective Supervisor. The **Worker Name** column of this table are hyperlinks for the Supervisor.

- The Supervisor can click the hyperlink and view the respective Eligibility Specialist's Daily Activity Sheet as seen below.
- In R2, the **Interim Reports**, **Periodic Reports** and **Intakes completed** by staff will also appear.



Team's Daily Activity

Daily Activity Sheet for (Eligibility Specialist) Hours in System: 3 hrs 18 min Last Updated: 10/20/2020 12:08 PM

Status	Start Time	Case Number	Case Name	Start Event	WMS Status	End Event	Decision	HH Size	Duration (Mins)
	09:06 AM			Application - Start Interview	AP	Complete Interview - Deferred for Verification	AC-A30	6	40
	09:48 AM			Application - ESNAP Processing	AP	Suspend Processing	AC-A30	6	22
	10:18 AM			Change Case - Change Case Ready	AC	Deferred/Pending Change Verification	AC-832	4	21
	10:42 AM			Application - Start Interview	AP	Suspend Interview	AP-	3	15
	11:04 AM			Recertification - Mandated Verification Received - Full	AC	Complete Processing	AC-A30	8	30
	11:35 AM			Document Review - Start Document Review	AC	NA	AC-A30	5	-

BACK BACK TO CITYWIDE SUMMARY

The name of the selected Eligibility Specialist is seen on the **Daily Activity Sheet** widget. Selecting the **Back to Summary** button at the bottom of the page will return the Supervisor to the Team's Daily Activity page.

The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist's daily activity as a snapshot of the work completed for the current day. This allows the Eligibility Specialist to keep track of their work and in addition allows the Supervisor to review the respective Eligibility Specialist's daily progress. The Daily Activity Sheet provides information on the **Status**, **Start Time**, **Case Number**, **Case Name**, **Start Event**, **WMS Status**, **End Event**, **Decision**, **HH Size**, and **Duration** (Mins):

- **Status**: The icons within this column provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation point) and **In-Progress** (blue hourglass).
- For an Interview, the Status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.
- For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
- When an event is currently **In-Progress**:
  - Duration column for that row will display a dash (minus sign).
  - End Event column for that row will display "**N/A**".
- **Start Time**:
- Displays the time that the event was started in the format: **hh:mm AM/PM**
- The default view will be based on the ascending order of Start Time.
- **Case Number**: This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
- For **Application** and **Recertification** Tasks:
  - Interview Started - If an Interview was either distributed from **Get Next** or started from **Case Search**, the element will display "Interview Started".
  - Ready to Assign Event - For any case that was distributed and started from the **Get Next** button, the **Ready to Assign Event** will be displayed. For example, "Mandated Verification Received – Full" event.
  - SPOS Activity - For any Events that were started from **Case Search**, the SPOS Activity must be used. For example, "Application Modification", "Make Case Comment", etc.
- For **Change Case:** The start event is typically: "Change Case Ready" (if started from Get Next) or "Start Processing" (if started from Case search).
- For **Document Review:** the start event is always: "Start Document Review".
- **WMS Status**: The existing WMS case status (starting state) – Applying (AP), Denied (RJ), Single Issue (SI), AC, Closed (CL) .
- For **Interim Report**: The start event that made the case ready to assign will appear.
- For **Periodic Report**: The start event that made the case ready to assign will appear.
- **End Event:** The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.
- For any start events in the status of **Interview** in the **Event Log**, the End Event is always either: Suspend Interview, Complete Interview.
- For **Change Case** and **Interim Report** events, the system checks whether a Deferral was made in the **Pending** status events; if yes, then the end event is

"Deferred/Pending Change Verification". Otherwise, the last event with a status of **Processing** is used.

- For other **Processing-related** start events other than **Change Case**, the End Event is recorded when the Processors finish their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).
- The End Event can be a **Complete interview**, **Suspend processing** or **Complete processing**. The End events will be further distinguished to have the exact outcome, with the possible values displayed below. The event log will also get updated accordingly.
    1. Complete Interview - No deferral
       Complete Interview - Deferred for verification
       Complete Interview - Deferred for IVS/RFI/SDX
       Complete Interview - Deferred for verification and IVS/RFI/SDX
       NOTE: For the Interview, the End Event will be the latest event in status of Interview.

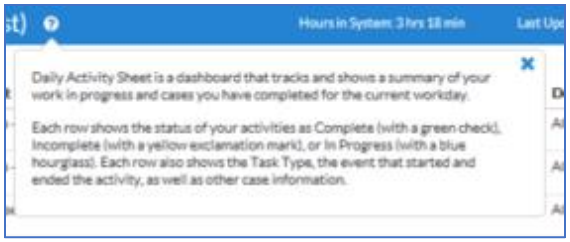
    2. Suspend Processing - Deferred for change verification
       NOTE: For processing actions, the end event will be the latest event in status of Processing. For Periodic Reports, the end event may also include a deferral.
- For cases that are "In Progress", the **End Event** column should reflect N/A for the respective row.

- **Decision:** This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.
- The decoded value is needed. For example: **AC-A30** (Same Approval each month), **RJ-V21** (Failure to Provide Verification), **SI-Q22** (Expedited Pending Verification).
- The description of the code will not be included.
- If there is no SPOS decision code, then the reason code will be blank. For example, "AP- ", "AC-"
- **HH Size:** Number of people in AP, SI or AC status in associated with the WMS case.
- **Duration (Min):** This value will be the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
    - For cases that are "In Progress", the duration field will be a dash (minus sign) for the respective row.

At the header level of the widget shows the time the selected Eligibility Specialist has spent in the ANGIE system in the format: **Hours in System: X hrs YY min.**

- Selection of the refresh button at the header of this widget will refresh the data for the Daily Activity widget. Consequently, the last updated timestamp will also update.

Help Text on Eligibility Specialist’s Daily Activity Sheet:



Attachment D

Manager Role

ANGIE Release 2 Notes

Table of Contents

1. Document Objective

The objective of this document is to provide context on the screens for the Manager's role within the Activity and General Information Exchange (ANGIE). The layout of the ANGIE dashboard for the Manager will allow the logical completion of the activities related to the role and consume the necessary information for the role.

2. Summary of Changes in Release 2 (R2)

This document also contains the details about new functionality in R2 of ANGIE, including:

- Addition of Supplemental Security Income (SSI) Center (**S15**) and Residential Treatment Center (**S61**) processing.
- Addition of Mailer, Match and Action Program (MMAP).
- Updates to dashboards.
- Task prioritization and assignments for Periodic Reports.
- Task prioritization and assignments for Interim reports.
- Recertification processing updates.
- Integration for documents received for review after a case closing or denial.
- Updates to **Case Search**.
- Manage Configurations - Different Hold Times for "Supervisor Help" and "Help Desk Support" Reasons.
- Task Assignment Based on Skillset.
- Warning Messages on Manage Staff tab.
- New Intake list.
- New Streamlined Paperless Office System (SPOS) Intake activity

3. S15 and S61 Processing

Processing for these centers will be added to ANGIE in R2 for Family Independence Administration Supplemental Nutrition Assistance Program (FIA SNAP):

- FIA's SSI Center is **S15**. Cases at this center have specialized budgeting and rules that require special logic.
- FIA's RTC for SNAP (**S61**) includes special processes for RTC applications, case changes and recertification processes. Cases at this center have specialized budgeting and rules that require special logic.

4. Mailer and Match Action Program (MMAP) Processing

FIA's MMAP group will be integrated with the ANGIE system in R2. This group is responsible for processing periodic reports, mandated matches for active SNAP cases, as well as special projects such as Mass Re-Budgeting (MRB) and other such initiatives.

MMAP staff is enrolled in Center **F25** with citywide access. The following roles will be integrated for MMAP:

- Eligibility Specialist
- Supervisor
- Manager
- Regional

5. Home Page: Dashboard for Manager

Upon login, the landing screen in ANGIE will be the **Dashboard** page. This screen will allow the Manager to view their progress, keep track of their team's progress, access their next priority task and search for cases. It will replace the individual's POS queue.

The screen includes the navigation bar on the left-hand side, the title bar with the Manager's name and the Tools menu and the main panel with the Manager's functions. In R2, a new **Intake** link was added in the navigation bar, which opens the new **Intake List**. For additional details on the Intake link and activity, please refer to the release notes for the Eligibility Specialists.

Collapsible widgets appear in the Dashboard, showing:

- **Your Work Counts!**
- **Team Progress**
- **Work Outstanding**
- **Case Search**
- **Get Next Case for Sign-off**
- **Get Next Case for Processing**

The widgets will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

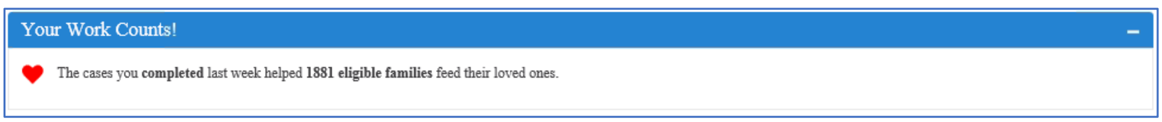
- Widget Name: The name of the respective widget will be displayed.
- Last Updated: Last updated timestamp on when the data was last updated in the format: Last Updated: **mm/dd/yy hh:mm AM/PM.**
- A **Refresh** button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

6. "Your Work Counts!" & "Today's Progress" Widgets for Manager

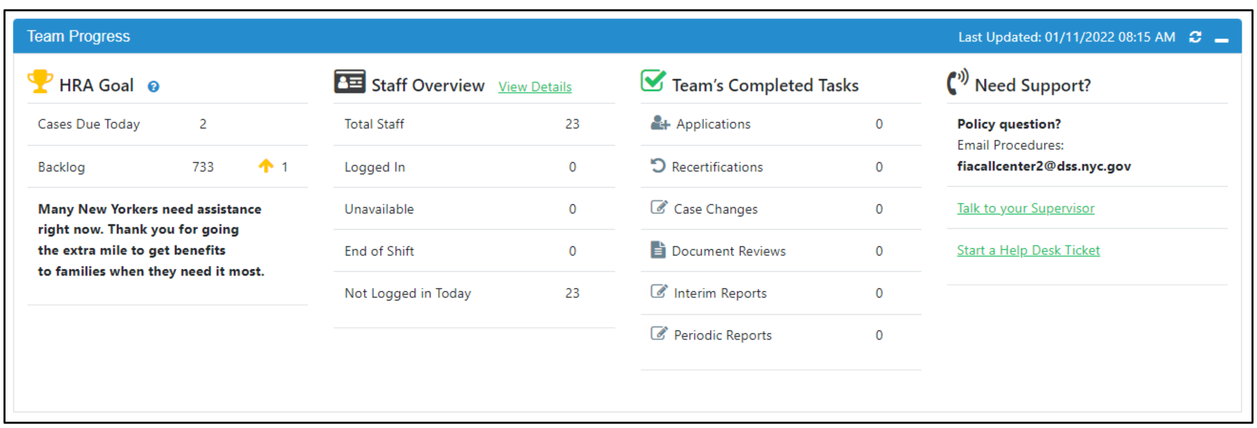
The **Your Work Counts!** widget provides positive messages for the Manager, with information about how many families their team's work helped in the previous week (first message as seen below) and positive messages from applicants and participants.

The positive messages are from applicants/participants and will be pulled from reviews of the Access Human Resources Administration (AHRA) mobile app in the App Store / Google Play store and also from AHRA site. The comments will be alternating between the first message. The information displayed within this widget gets updated weekly.

- There will be a table with all possible messages that could be displayed from the sources mentioned. This would be a static table that would get refreshed periodically with a new list.
- Each time the Manager logs into ANGIE or returns to ANGIE from SPOS, either the “The cases you completed last week helped X eligible families feed their loved ones.” or that day’s HRA message will be displayed. Selection will be random.



Team progress widget for the Manager consists of four sections including **HRA Goal, Staff Overview**, **Team’s Completed Tasks**, and **Need Support?**. This widget keeps track of the Manager’s team progress throughout the day.



The **HRA Goal** section provides information to the Manager on the **Cases Due Today** and **Backlog**:

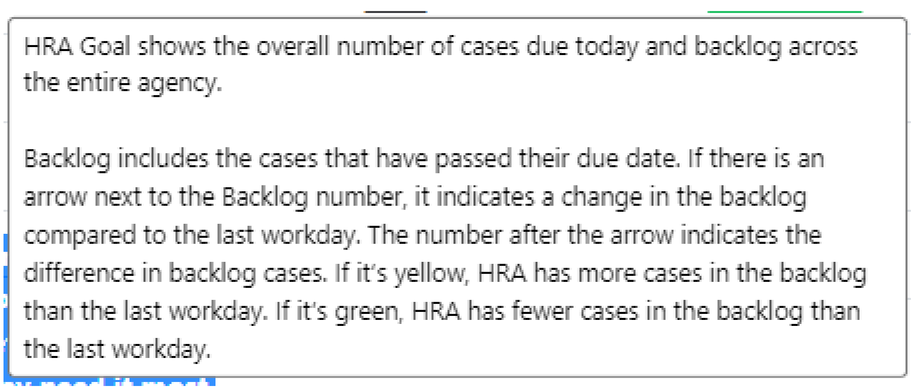
- **Cases Due Today** displays all tasks with a Priority Date of Today.
- **Backlog** is displayed as the sum of tasks that are late and overdue.
  - Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday,
  - Arrow down (displayed in green) for a decrease in the backlog since yesterday,
  - No arrow at all (just the backlog number) for no increase or decrease in the backlog number. Where there are zero cases in the backlog for

more than one day, the number of days that the backlog has been zero will be counted.

- ➢ This backlog comparison is comparing the start of day backlog number from yesterday to the start of day backlog number from today.
- ➢ The backlog comparison is calculated at 5:30am each day.
- ➢ The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.

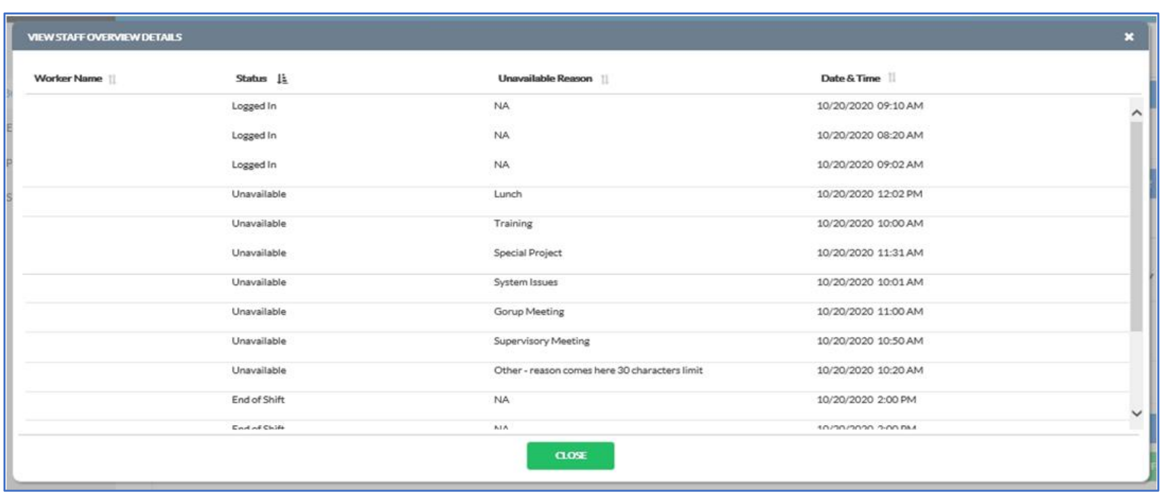
- Below the **Cases Due Today** and **Backlog**, there will be text indicating: “Many New Yorkers need assistance right now. Thank you for going the extra mile to get benefits to families when they need it most”.

Help Text displayed for HRA Goal:


HRA Goal shows the overall number of cases due today and backlog across the entire agency.

Backlog includes the cases that have passed their due date. If there is an arrow next to the Backlog number, it indicates a change in the backlog compared to the last workday. The number after the arrow indicates the difference in backlog cases. If it's yellow, HRA has more cases in the backlog than the last workday. If it's green, HRA has fewer cases in the backlog than the last workday.

The **Staff Overview** section provides information to the Manager on their **Total Staff**, **Logged In**, **Unavailable**, **End of Shift**, and **Not logged in Today**. The Manager can get more details in terms of the Worker Name, Status, Unavailable Reason, and Date & Time by selecting the **View Details** link located in this section as seen above, which opens the **Details** screen below.


VIEW STAFF OVERVIEW DETAILS

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM

CLOSE

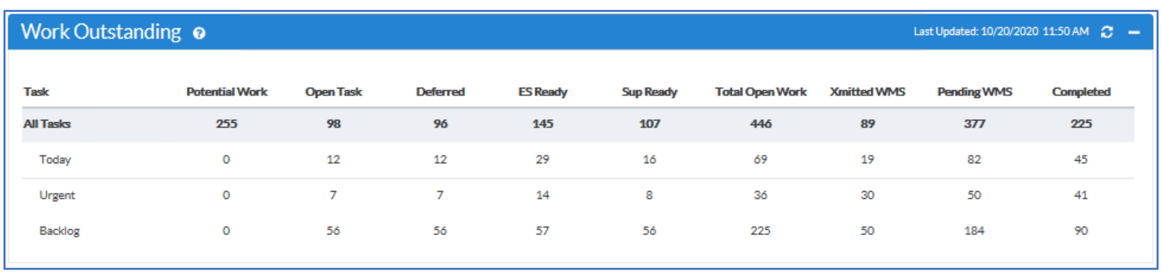
The **Team's Completed Tasks** section displays the number of **Applications**, **Recertifications**, **Case Changes**, **Document Reviews**, **Periodic Reports**, and **Interim Reports** the Manager's team completed for that day up to the point in which the timestamp is shown in the banner.

The **Need Support?** section provides the email for the Office of Procedures Call Center (fiacallcenter2@dss.nyc.gov) as read-only.

- Clicking on **Talk to your Supervisor** opens **Microsoft Teams**.
- Clicking on **Start a Help Desk Ticket** opens the **Self-Service Incident Form** and allows the staff to report any technical issue they may encounter in ANGIE.

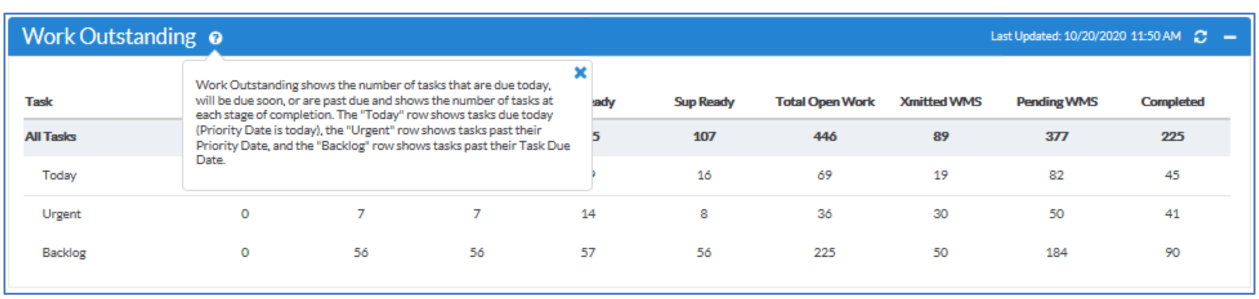
7. Work Outstanding Widget in the Manager Dashboard

The **Work Outstanding** widget shows the ANGIE work that is outstanding by criticality so that the Manager can review what remains ahead and what was completed. The data shown in the dashboard includes **All Tasks** consisting of rows for **Today** (Priority Date Today), **Urgent** (Late, past Priority Date before/including Task Due Date), and **Backlog** (Overdue, past Task Due Date). The data is split across columns for **Potential Work**, **Open Task**, **Deferred**, **ES Ready**, **Sup Ready**, **Total Open Work**, **Xmitted WMS**, **Pending WMS**, and **Completed**.


Work Outstanding
Last Updated: 10/20/2020 11:50 AM

Task	Potential Work	Open Task	Deferred	ES Ready	Sup Ready	Total Open Work	Xmitted WMS	Pending WMS	Completed
All Tasks	255	98	96	145	107	446	89	377	225
Today	0	12	12	29	16	69	19	82	45
Urgent	0	7	7	14	8	36	30	50	41
Backlog	0	56	56	57	56	225	50	184	90

Help Text for the Work Outstanding:



In R2, two new task types will be added:

- Periodic Report – Cases in Active status (AC) that must complete a mandated periodic report.
- Interim Report – Cases in AC at center **S15** that must complete a mandated interim report.

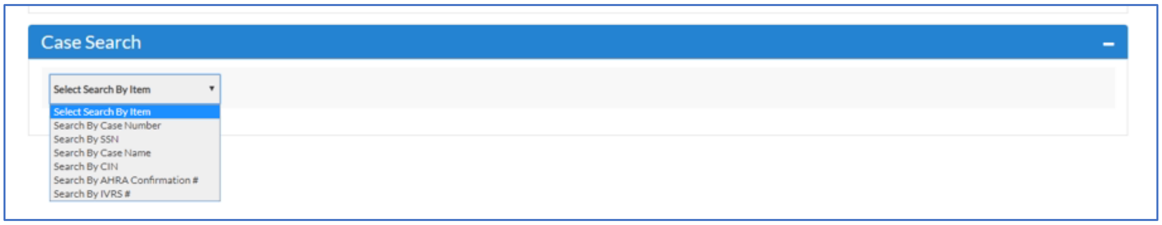
Periodic Reports
Monthly lists of cases due for a periodic report are received from the Welfare Management System (WMS) and will be loaded into ANGIE. ANGIE will track the submission of the online periodic report and indexing of the periodic mailer forms that make cases ready for sign-off, in order to assign the tasks to MMAP supervisors based on the priority and due dates.

Interim Reports
Monthly lists of **S15** cases due for an interim report are received from WMS and will be loaded into ANGIE. ANGIE will track the indexing of the interim report forms that make cases ready for sign-off, in order to assign the tasks to FIA SNAP supervisors based on the priority and due dates.

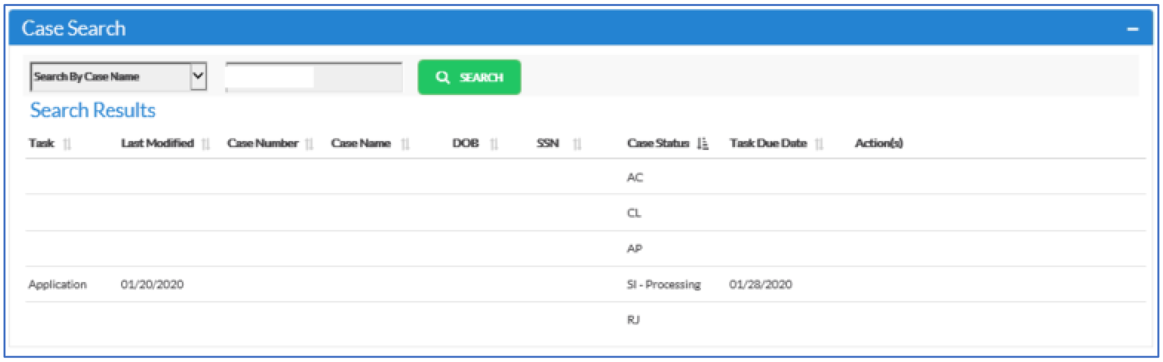
8. Case Search: Manual Assignment of Tasks

To manually assign a task, the Manager must first search for the respective case. The Manager can execute a search based on the following criteria:

- **Case Number**
- **SSN**
- **Case Name**
- **CIN**
- **Access Human Resources Administration (AHRA) Confirmation #**
- **IVRS #** (Interactive Voice Response System for Recertifications)



Based on the criteria selected from the dropdown, the Manager will be required to enter the corresponding information. Upon selecting the **Search** button, the system will display the search results consisting of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **Social Security Number (SSN)**, **Case Status**, **Task Due Date** and **Action(s)**.



- Selecting the desired row will highlight that row. Once the desired row is selected, the Manager can select from available options from the **Action(s)** dropdown and select **Go** to execute. The options available within the **Action(s)** dropdown are dependent on the **Case Status** of the **Search** result. The search process can result in the following three outcomes:

(1) **Open Task**

- Cases with **Open Task** will have information in the **Task** and **Last Modified** columns of **Search Results** section
- If the system finds a case with **Open Task**, it will display this case first in the **Search Results** section
- If the system finds multiple cases with open tasks, it will display these cases first and sorted by earliest date in the **Task Due Date** column

(2) **Latest Task**

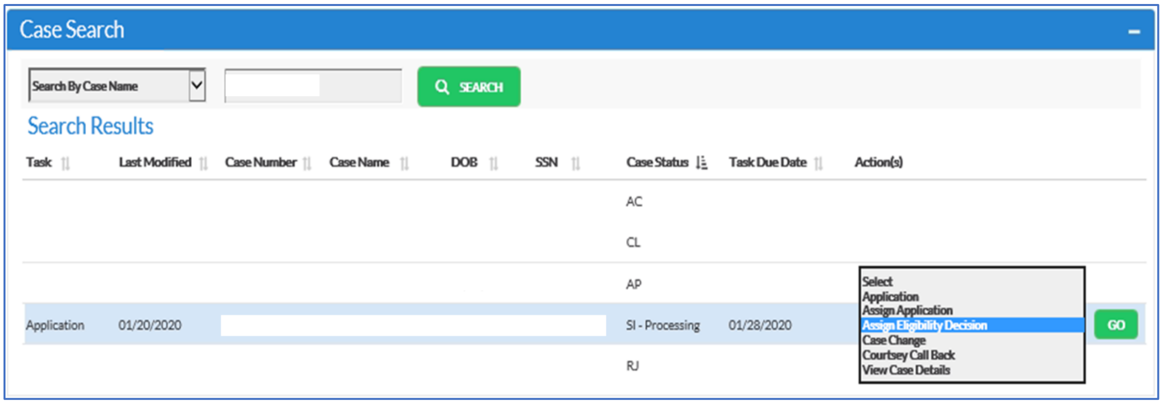
- If the system does not return any cases with open tasks in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
- Cases without open task are those where these is no information in the **Task** and **Last Modified** columns of the **Search Results** section

(3) **No Task**

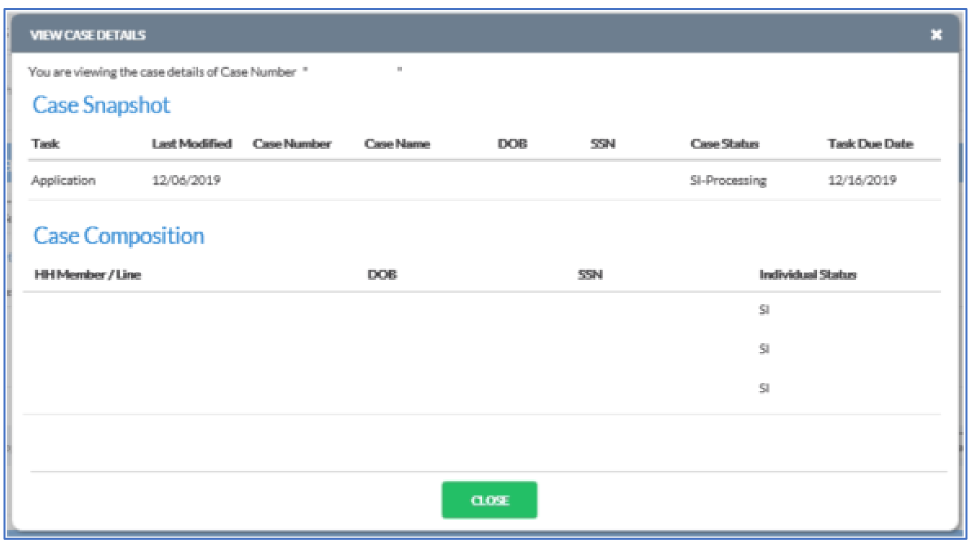
- The system displays message “No Case found, please refine your search criteria.”

Search Results Actions(s) Combo Box will contain a list of available actions for the Manager. These actions will be table-driven. These tables allow control at the following levels:

- Role of Manager (there are many titles within 1 role) –SPOS roles will be leveraged to maintain compatibility with POS queue during the project.
- Center designation of Manager.
- Current WMS case status of the selected case in search results.
- List of activities available for the case, based on the case status and open task.



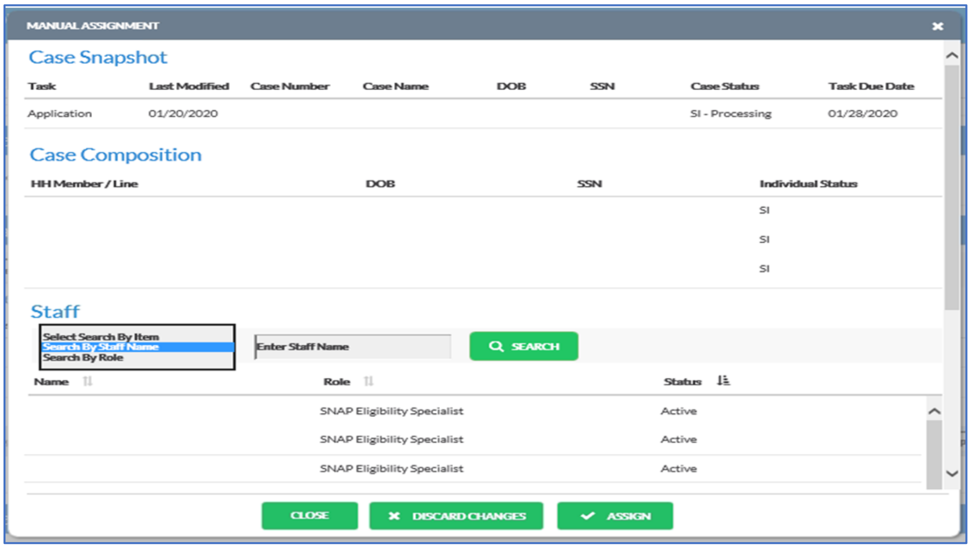
- Selecting the **View Case Details** option from **Action(s)** and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.



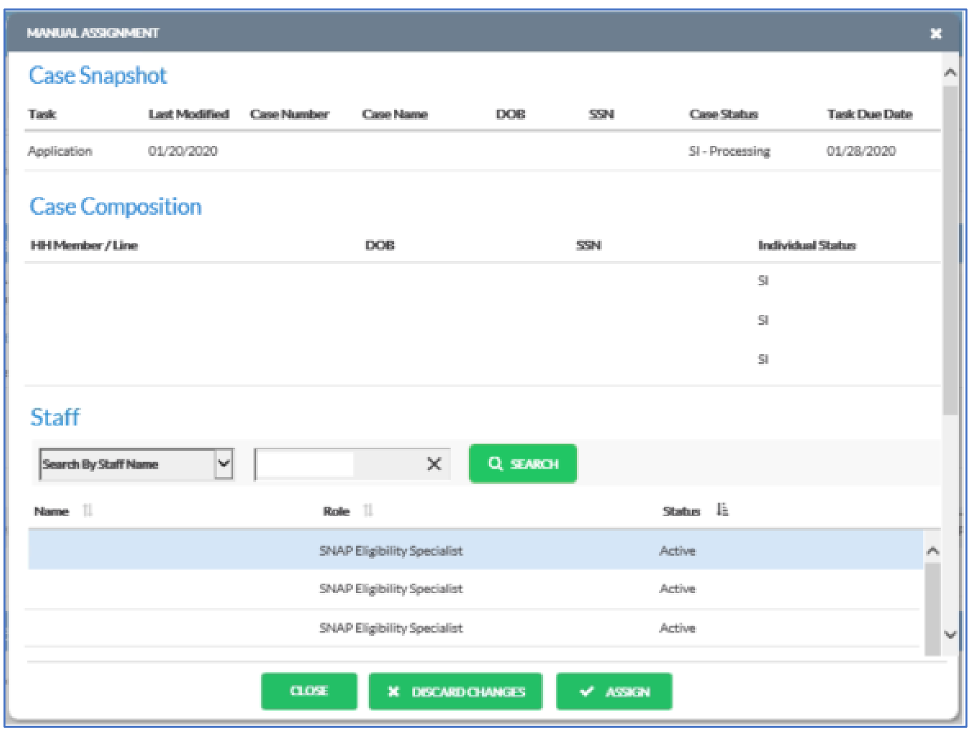
The Manager can manually assign tasks by searching for the case and then selecting the **Assign** option from the **Actions** dropdown. Clicking on the **Go** button results in a modal window displaying the **Case Snapshot**, **Case Composition**, along with the **Staff** section as seen below.

The columns for the **Case Snapshot** section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**.

The columns for the **Case Composition** section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**. Within the Staff section, the Manager can search for the Staff based on **Staff Name** or **Role** and then select the intended staff within the grid. If **Name** is selected, then the Manager is required to enter the name as seen below. If **Role** is selected, the Manager is required to select an option from the **Role** dropdown consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, or **Clerical Associate**. Selecting the **Search** button will display the search results in the grid. The sortable columns displayed in the Staff section include **Name**, **Role**, and **Status**.



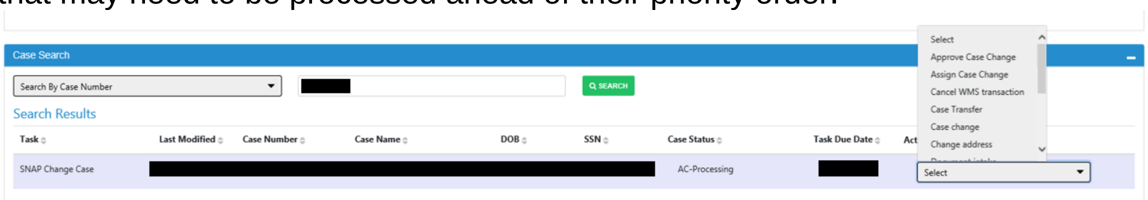
Once a row is selected for the intended staff, it will highlight, and selecting the **Assign** button will assign the task to that staff.



The Manager will see a green banner to inform that the task has been successfully assigned.

9. Case Search: Search for Pending Approvals

The Manager will be able to search for pending approvals in the **ANGIE Case Search** and will be able to start the approvals. This will allow for sign-off of cases that may need to be processed ahead of their priority order.



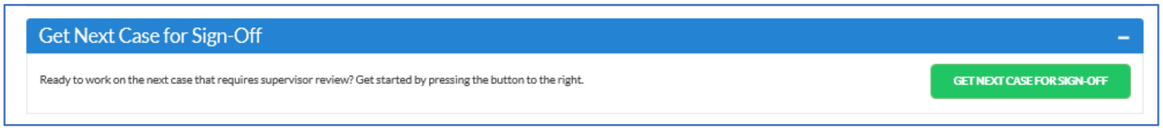
10. Case Search: New Warning Messages for Duplicate Activities

When staff selects an activity other than **Review Case** and **View Details** in **Case Search**, ANGIE will confirm whether the same activity was already completed as part of the current task when the **Go** button is clicked and before launching SPOS.

- If the same activity was already completed in the current task, ANGIE will display the following warning message: "This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?"
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the Case Search will be reset.
- For recertification tasks, if the recertification due date is more than 4 months in the future, ANGIE will display the following warning message: "This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?"
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the Case Search will be reset.
- If there was a transmission to WMS on the current day from SPOS, then ANGIE will display the following warning message: "There was a transmission to WMS for this case today. You may be starting a duplicate activity. Continue to SPOS?"
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the **Case Search** will be reset.

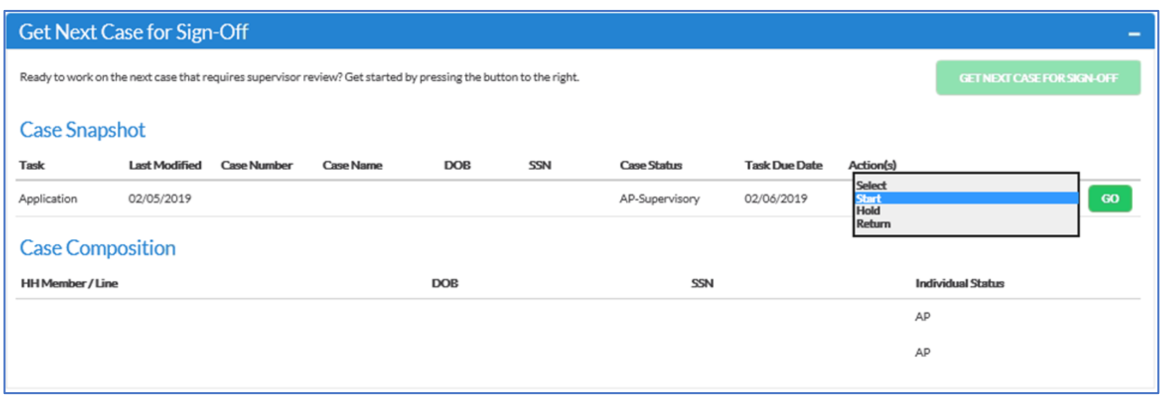
11. Get Next Case for Sign-off: Next Approval Task for Manager

- The Manager will get the next task to approve by selecting the **Get Next Case for Sign-off** button located within the dashboard. The approval tasks that are distributed to the Manager will be based on the priority logic.



- Once the button is clicked, the Manager will see a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for the **Case Snapshot** section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date,** and **Action(s)**. The columns for the **Case Composition** section consist of **HH Member/line**, **DOB**, **SSN**, and **Individual Status**.
- In R2, the **Task** column was updated to provide additional detail about the assigned work. For example, it will inform the manager if the assigned task is an error correction.
- Previously, it only informed the manager that an application, recertification, change case or document review task was assigned.
- In R2, two new task types will be added for sign-off: Periodic Report and Interim Report.

The Manager will be able to start the **Approval** task by selecting the **Start** option within the **Action(s)** dropdown, and then selecting the **GO** button. The ANGIE system will then launch SPOS for the Manager to approve the respective task.

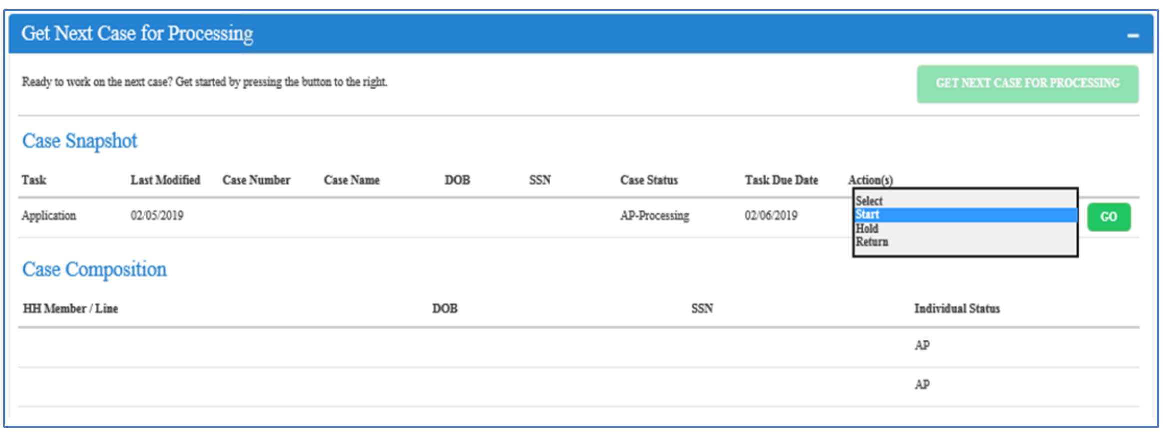


12. Get Next Case for Processing for Manager

The Manager can step down to the role of the Eligibility Specialist (ES) and function as an Eligibility Specialist. The tasks that are distributed to Managers within this widget, are non-approval tasks. This function will allow the Manager to help the Eligibility Specialists perform their tasks when additional person power is needed.

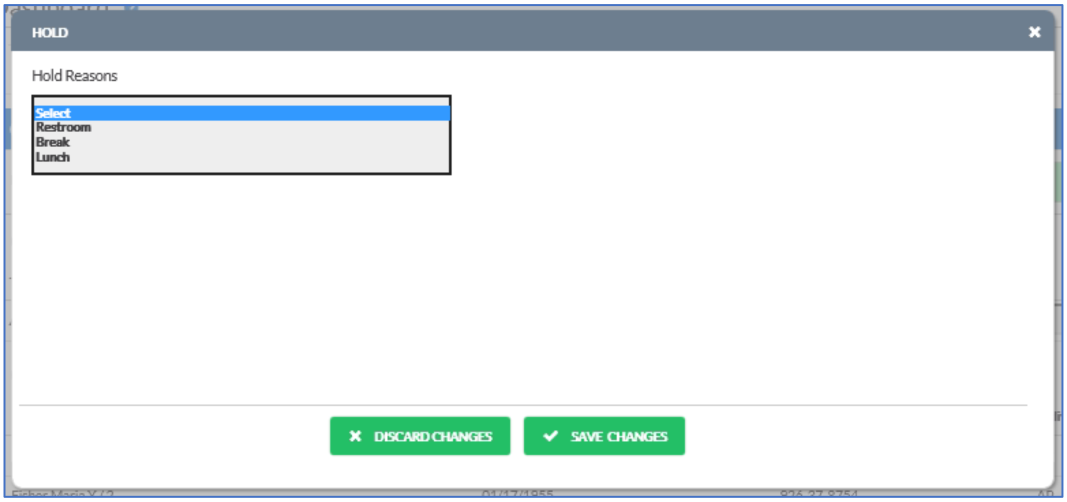
- Selecting the **Get Next Case for Processing** button located within the dashboard will distribute a non-approval task based on the priority logic.

- Once the button is clicked, the Manager will see a case profile consisting of **Case Snapshot** and **Case Composition** as seen below. The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date**, and **Action(s)**. The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.
- The Manager will be able to start the task by selecting the **Start** option within the **Action(s)** dropdown, and then selecting the **GO** button. The ANGIE system will then launch the SPOS application for the Manager to work on the respective task.
- In R2, the **Task** column was updated to provide additional detail about the assigned work. For example, it will inform the staff if the assigned task is an error correction.
  - Previously, it only informed the staff that an application, recertification, change case or document review task was assigned.
- In R2, two new task types will be added: **Periodic Repor**t and **Interim Report**.

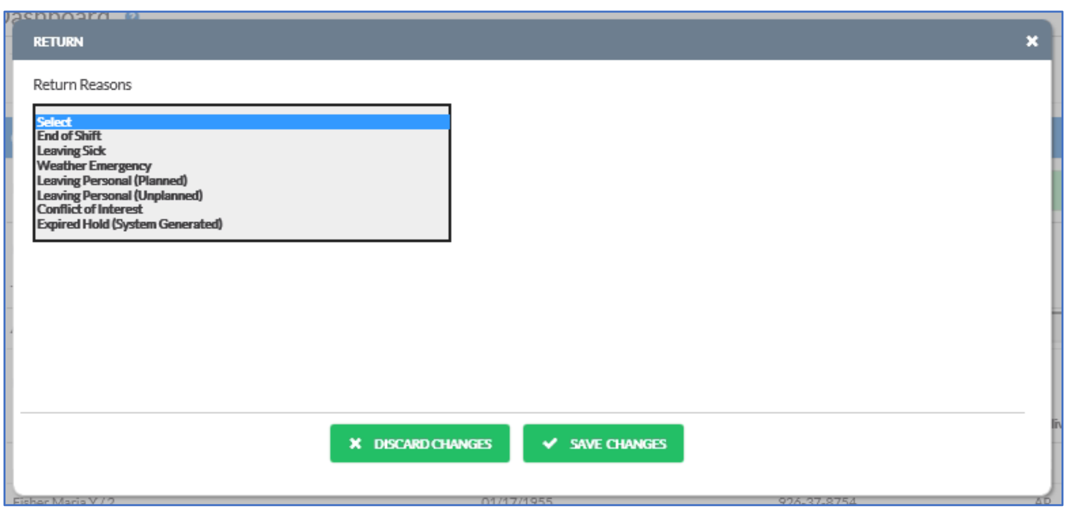


13. Hold or Return Task

- The Manager can execute a **Hold** or **Return** on a task and is applicable to both the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets. The Manager can execute a hold on a task by selecting the **Hold** option from the **Action(s)** dropdown and clicking on the **Go** button. The Manager will see a modal window and is required to select from the available Hold Reasons (**Restroom**, **Break**, **Lunch**). Once the Manager selects the applicable hold reason and then selects **Save Changes,** the hold will be applied on the respective task for a set time (2 hours), for that Manager. **Note**: The Manager cannot work on another "prioritized task" until the hold task is worked. If the Manager returns within the set time, the Manager will be provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task will be placed back in the general pool and another Manager may have access to that task.



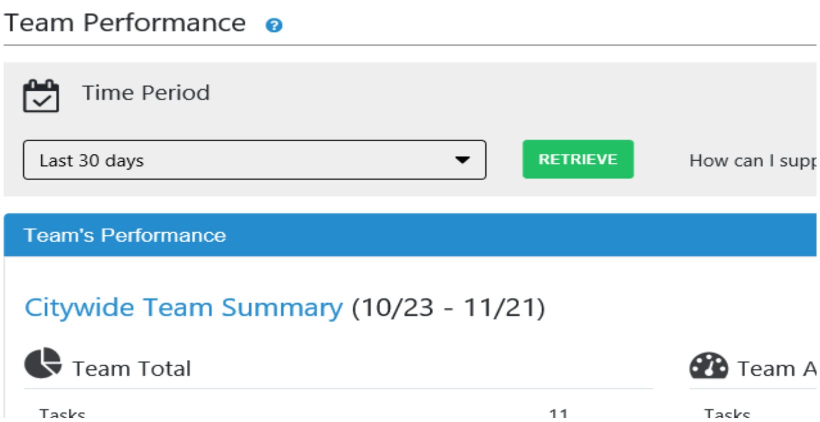
- The Manager can return a task by selecting the **Return** option from the **Action(s) dropdown and clicking on the Go button. The Manager will see a modal window** and must select from the available Return Reasons (**End of Shift**, **Leaving Sick**, **Weather Emergency**, **Leaving Personal (Planned)**, **Leaving Personal (Unplanned)**, **Conflict of Interest**, **Expired Hold (System Generated)**).
- After selecting the applicable return reason and clicking on the **Save Changes** button, the task will be returned to the general pool and another Manager can get the task.



14. Team Performance Page for Manager

The Manager can access their **Team Performance** page from the left navigation pane. This page will provide metrics to gauge the team's performance and allow the Manager to drill-down from the **Citywide** view (default) to **Regional** Manager view, **Manager** view, **Supervisor** view, and finally to the **Eligibility Specialist** view. In R2, information about supervisor returns was added.

The page consists of the **Timeframe Selector,** the **Accuracy – WMS Error Rate** widget and the new **Accuracy – Supervisor Returns** widget as seen below.



The Manager will start with the **Citywide** view as the default view on this page as seen above. This page consists of **Citywide Team Summary** and **Citywide Staff Detail** sections.

The **Citywide Team Summary** section of the page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, the **Error rate** as a percentage, the number of **Returns**, and the **Return rate** as a percentage.

- The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the team's WMS Error Rate is above, below, or the same as the HRA Average, respectively.
- The **Return Rate** for the **Team Average** table will be displayed within the green box, yellow box, or blue box to indicate if the team's Supervisor Return Rate is above, below, or the same as the HRA Average respectively.

Team's Performance Last Updated: 12/06/2021 12:00 AM

[redacted] (9/7 - 12/5)

Team Total	
Tasks	19
Errors	8
Returns	5

Team Average	
Tasks	2
Errors	1
Error Rate	42%
Returns	1
Return Rate	26%

HRA Average	
Tasks	2
Errors	1
Error Rate	35%
Returns	0
Return Rate	20%

The **Citywide Staff Detail** section contains columns for **Regional Manager Name**, **Tasks**, **Errors**, **Error Rate**, **Returns** and **Return Rate.** To the left of the Regional Manager Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in need of improvement.
- **Green Star icon** shows above average performance.

- Selecting the name within the **Regional Manager Name** column in the **Citywide** view will give access to the selected **Regional Manager** view.
- Consequently, depending on the name selected for drill-down, the **Team Summary** values on top changes to show the selected **Regional Manager's Team Summary**.
- The **Staff Detail** section on the bottom of the page changes to show the selected **Regional Manager's Staff Detail** as seen in below screen.

[redacted]

Worker Name	Tasks	Errors	Error Rate	Returns	Return Rate
[redacted]	2	1	50%	1	50%
	0	0	0%	1	0%
	2	1	50%	1	50%
	11	4	36%	1	9%

The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, the **Error rate** as a percentage, the number of **Returns**, and the **Return rate** as a percentage.

- The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the selected team's WMS Error Rate is above, below, or the same as the HRA Average, respectively.
- The **Return Rate** for the **Team Average** table will be displayed within the green box, yellow box, or blue box to indicate if the team's Supervisor Return Rate is above, below, or the same as the HRA Average respectively.

Navigating each view:

- The Regional Manager view will contain the name of the selected Regional Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Regional Manager.
    - From the **Regional Manager** view (above screen), the Manager can access the **Manager view** by selecting the name within the **Manager Name** column and view the details for the manager's team.
- The **Manager** view will contain the name of the selected Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Manager.
    - From the **Manager** view (above screen), the Manager can access the **Supervisor view** by selecting the name within the **Supervisor Name** column.
- The Supervisor view will contain the name of the selected Supervisor in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Supervisor.
    - From the **Supervisor** view (above screen), the Manager can access the **Eligibility Specialist view** by selecting the **Errors** and **Error Rate** values for the respective Eligibility Specialist.
- The Eligibility Specialist view will contain the name of the selected Eligibility Specialist on the widgets **Accuracy – WMS Error Rate** and **Most Common WMS Errors**.
    - Selecting **Close** will return Manager to the **Supervisor** view.
- Selecting **Back** will Navigate the Manager to the previous page.
- Selecting **Back to Citywide Summary** will navigate to the **Citywide** View.

15. Team's Daily Activity for Manager

The **Team's Daily Activity** page can be accessed by the Manager from the left navigation pane. This page starts with the **Citywide** view for the Manager and consists of **Activity Summary – Citywide** and **Activity Detail – Citywide** widgets as seen below.

Team's Daily Activity

Activity Summary - Citywide Last Updated: 01/24/2022 10:38 AM

Staff Overview View Details

Total Staff	244
Logged In	5
Unavailable	1
End of Shift	0
Not Logged in Today	238

Tasks Status

Initiated	2
In Progress	0
Incomplete	2
Complete	0

Tasks Completed

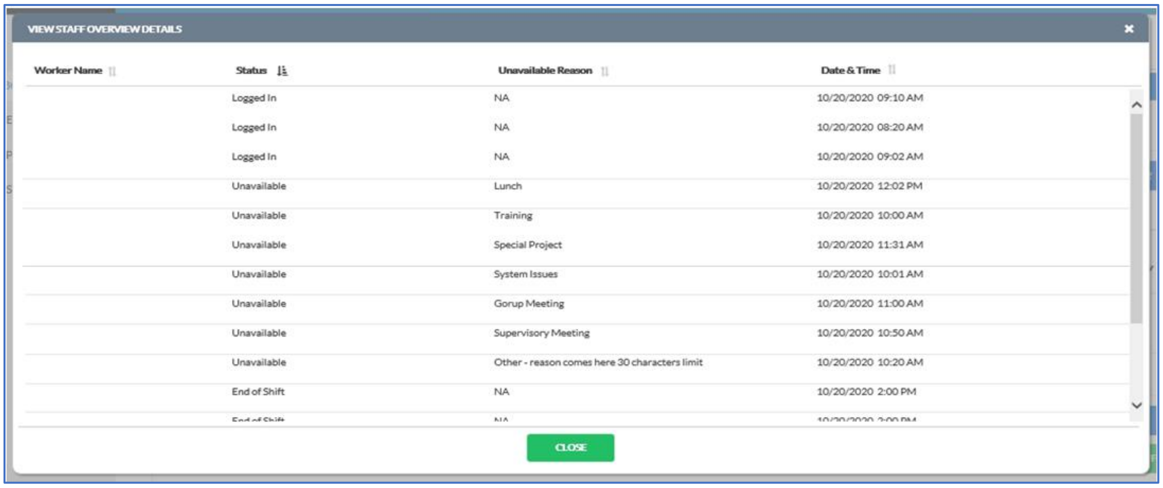
Completed Interviews	0
Completed Application Processing	0
Completed Recertification Processing	0
Completed Case Changes	0
Completed Document Reviews	0
Completed Periodic Reports	0
Completed Interim Reports	0

Activity Detail - Citywide Last Updated: 01/24/2022 10:38 AM

Regional Manager Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews	Interim Report	Periodic Report
	0	2	0	0	0	0	0	0	0	0
Total	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

The **Activity Summary – Citywide** widget consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the **Total Staff**, **Logged In**, **Unavailabl**e, **End of Shift**, and **Not Logged in Today**. The **Tasks Status** table provides information on the number of tasks that are **Initiated**, **In Progress**, **Incomplete**, and **Complete**. The **Tasks Completed** table provide the number of tasks that are completed for **Interviews**, **Applications**, **Recertifications**, **Case Change**, **Document Reviews**, **Periodic Reports** and **Interim Reports.**

A **View Details** link is provided within the **Staff Overview** table that will provide details of staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today.** Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** as seen below will display. Selecting **Close** will return the Manager to the default Citywide view of the Team's Daily Activity page.



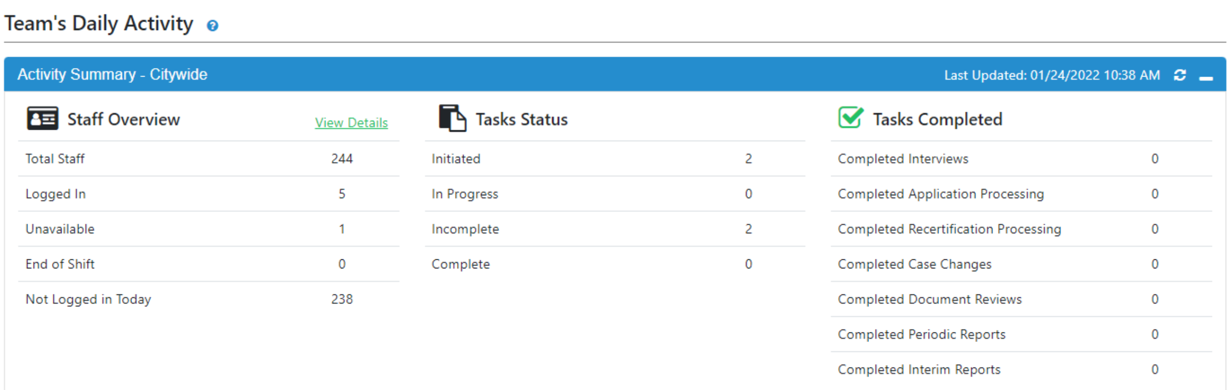
VIEW STAFF OVERVIEW DETAILS

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM

CLOSE

The default view of the **Activity Detail – Citywide** widget shows columns for **Regional Manager Name**, **Tasks in Progress**, **Tasks Incomplete**, **Tasks Complete**, **Interview**, **Application**, **Recertification**, **Case Change**, **Document Reviews**, **Periodic Reports** and **Interim Reports**.

The **Regional Manager Name** column has links and upon selection, the Manager can view the selected **Regional Manager's Team's Daily Activity** page as seen below.



Team's Daily Activity

Activity Summary - Citywide — Last Updated: 01/24/2022 10:38 AM

Staff Overview (View Details)	
Total Staff	244
Logged In	5
Unavailable	1
End of Shift	0
Not Logged in Today	238

Tasks Status	
Initiated	2
In Progress	0
Incomplete	2
Complete	0

Tasks Completed	
Completed Interviews	0
Completed Application Processing	0
Completed Recertification Processing	0
Completed Case Changes	0
Completed Document Reviews	0
Completed Periodic Reports	0
Completed Interim Reports	0

In the Regional Manager view (above screen), the selected Regional Manager's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected Regional Manager's Team's Daily Activity.

The **Activity Summary** widget for the selected Regional Manager consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**.

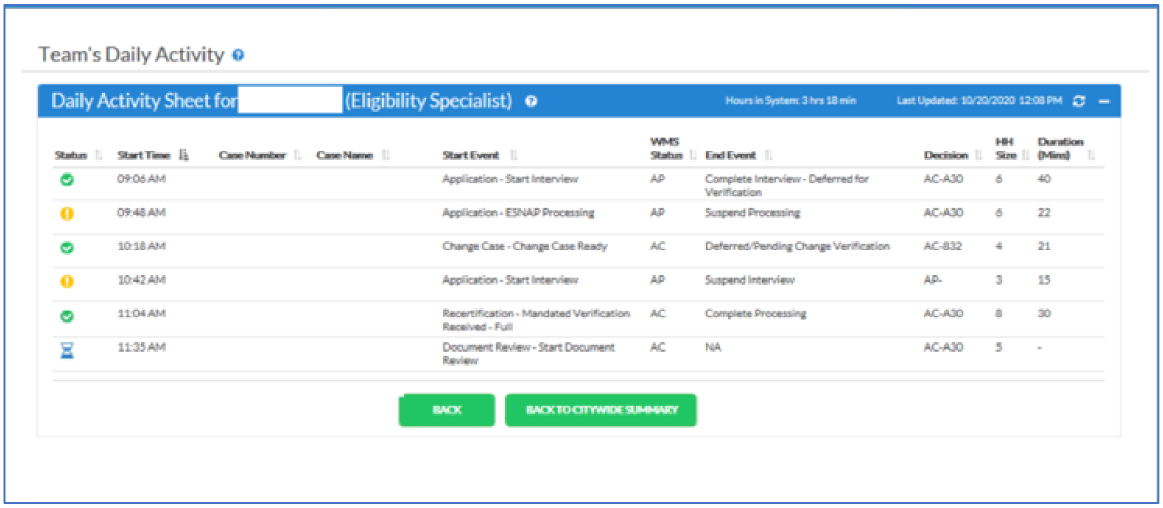
- The **Staff Overview** table provides an inventory of the **Total Staff**, **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**.

- The **Tasks Status** table provides information on the number of tasks that are **Initiated**, **In Progress**, **Incomplete**, and **Complete**.
- The **Tasks Completed** table provide the number of tasks that are completed for **Interviews**, **Applications**, **Recertifications**, **Case Changes**, and **Document Reviews**.
- In the **Tasks Completed** section, the labels were updated to add the word **Completed** before each task type and **Completed Periodic Reports** and **Completed Interim Reports** were added.

A **View Details** link is provided within the **Staff Overview** table that will provide details of the Regional Manager's staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today.** Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** will display.

The **Activity Detail** widget for the selected Regional Manager shows columns for **Manager Name**, **Tasks in Progress**, **Tasks Incomplete**, **Tasks Complete**, **Interview**, **Application**, **Recertification**, **Case Change**, and **Document Reviews**. The **Manager Name** column contains links and upon selection, the Manager can drilldown to the selected **Manager's Team's Daily Activity** page as seen below. Selecting **Back to Citywide Summary** in above screen navigates the Manager to the default **Citywide View** (above screen). In the **Activity Detail** section, the **Interim Report** and **Periodic Report** task types were added.

- In the **Manager** view, the selected Manager's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected **Manager's Team's Daily Activity**. The Manager can drill down to the Supervisors under the selected Manager.
- In the **Supervisor** view, the selected Supervisor's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected **Supervisor's Team's Daily Activity**. The Manager can also view the **Daily Activity Sheet** for individual Eligibility Specialists from the **Supervisor** view.



- The name of the selected Eligibility Specialist is seen on the **Daily Activity Sheet** widget.
- The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist's daily activity as a snapshot of the work completed for the current day.
- This allows the Manager to review the respective Eligibility Specialist's daily progress.

The **Daily Activity Sheet** provides information on the **Status**, **Start Time**, **Case Number**, **Case Name**, **Start Event**, **WMS Status**, **End Event**, **Decision**, **HH Size**, and **Duration** (Mins):

- **Status**: The icons within this column provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation) and **In-Progress** (blue hourglass).
- For an Interview, the Status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.
- For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
- When an event is currently in progress:
    - Duration column for that row displays a dash (minus sign).
    - End Event column for that row displays "**N/A**".
- **Start Time**:
    - Displays the time that the event was started in the format: **hh:mm AM/PM.**
    - The default view will be based on the ascending order of Start Time.
- **Case Number**: This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
    - For **Application** and **Recertification** Task:

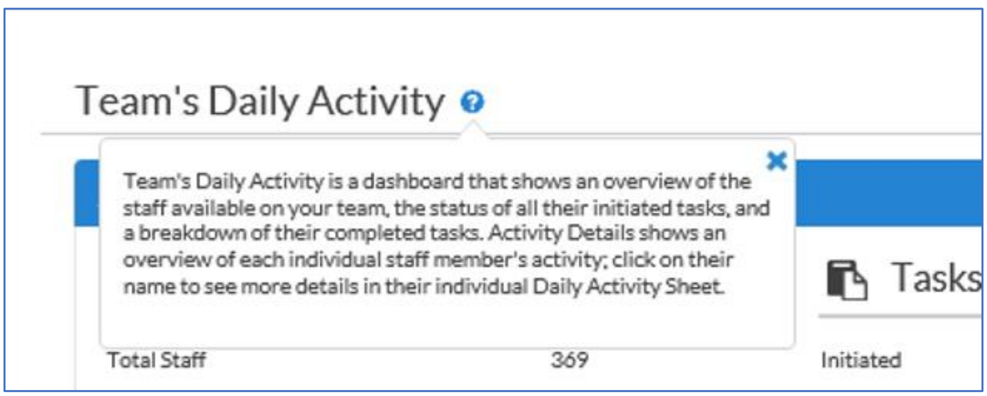
  - ➢ Interview Started - If an Interview was either distributed from **Get Next** or started from **Case Search**, the element must display "Interview Started".
  - ➢ Ready to Assign Event - For any case that was distributed and started from the **Get Next** button, the **Ready to Assign Event** must be displayed. For example, "Mandated Verification Received – Full" event.
  - ➢ SPOS Activity - For any Events that were started from **Case Search**, the **SPOS Activity** must be used. For example, "Application Modification", "Make Case Comment", etc.
  - For **Change Case**, **Periodic Report** and **Interim Report:** The start event is typically: "Change Case Ready" (if started from Get Next) or "Start Processing" (if started from Case search).
  - For **Document Review**, the start event is always: "Start Document Review".
- **WMS Status**: The existing WMS case status (starting state) – Applying (AP), Denied (RJ), Single Issue (SI), Active (AC), Closed (CL).
- **End Event:** The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.
  - For any start events in the status of **Interview** in the **Event Log**, the **End Event** is always either: **Suspend Interview** or **Complete Interview**.
  - For **Change Case** events, the system checks whether a Deferral was made in the **Pending** status events; if yes, then the end event is "Deferred/Pending Change Verification". Otherwise, the last event with a status of **Processing** is used.
  - For other **Processing-related** start events other than **Change Case**, the End Event is recorded when the Processors finishes their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).
  - The End Event can be **Complete Interview**, **Suspend Processing** or **Complete Processing**. The End events will be further distinguished to have the exact outcome, with the possible values displayed below. The event log will also get updated accordingly.
    1. Complete Interview - No deferral
       Complete Interview - Deferred for verification
       Complete Interview - Deferred for IVS/RFI/SDX
       Complete Interview - Deferred for verification and IVS/RFI/SDX
       Note: For the Interview, the End Event will be the latest event in status of Interview

    2. Suspend Processing - Deferred for change verification
       Note: For processing actions, the **End Event** will be the latest event in status of Processing
  - For cases that are "In Progress", the **End Event** column will reflect N/A for the respective row.
- **Decision:** This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.

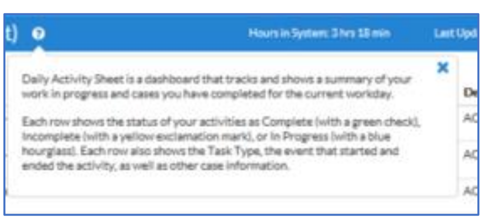
    - The decoded value is needed. For example: **AC-A30** (Same Approval each month), **RJ-V21** (Failure to Provide Verification), **SI-Q22** (Expedited Pending Verification).
    - The description of the code will not be included.
    - If there is no SPOS decision code, then the reason code will be blank. For example, “Application Pending (AP)- “, “Active (AC)-“
  - **HH Size** Number of people in AP, S) or AC status in associated with the WMS case.
  - **Duration (Min):** This value will be the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
    - For cases that are “In Progress”, the duration field will be a dash (minus sign) for the respective row.

- Selecting **Back** navigates the Manager to the previous page.
- Selecting **Back to Citywide Summary** navigates Manager to the default Citywide View.

Help Text - Team’s Daily Activity Page



Help Text on Eligibility Specialist’s Daily Activity Sheet:

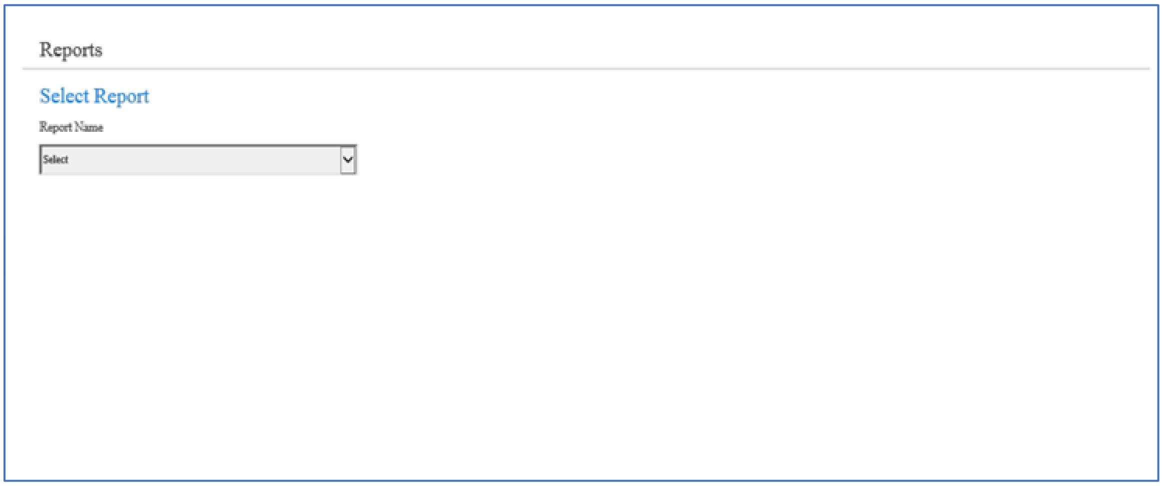


16. Reports Page

The Manager will have access to the **Reports** page from the left navigation pane and can generate the following reports:

- **Daily Activity**
- **Deferrals**

- **Staff Overview**
- **Timings**
- **Work Outstanding**



New reports will be added in R2:

- Performance Management – Supervisor Returns
- Performance Management – WMS Errors
- Performance Management – Deferrals
- WMS Transmissions
- Selective Case Review Summary
- Selective Case Review Details

Reports will be covered in detail in a separate document.

Attachment E

Regional Manager & Business Administrator Roles

ANGIE Release 2 Notes

Table of Contents

1. Document Objective

The objective of this document is to provide context on the screens for Regional Manager and Business Administrator roles within the Activity and General Information Exchange (ANGIE). The layout of the ANGIE dashboard for these roles will allow the logical completion of the activities related to the role and consume the necessary information for the role.

2. Summary of Changes in Release 2 (R2)

This document also contains the details about new functionality in R2 of ANGIE, including:

- Addition of Supplemental Security Income (SSI) Center (**S15**) and Residential Treatment Center (RTC) (**S61**) processing.
- Addition of Mailer, Match and Action Program (MMAP).
- Updates to dashboards.
- Task prioritization and assignments for Periodic Reports.
- Task prioritization and assignments for Interim reports.
- Recertification processing updates.
- Integration for documents received for review after a case closing or denial.
- Updates to Case Search.
- Manage Configurations - Different Hold Times for “Supervisor Help” and “Help Desk Support” Reasons.
- Task Assignment Based on Skillset.
- Warning Messages on Manage Staff tab.
- New Intake list.
- New SPOS Intake activity.

3. S15 and S61 Processing

Processing for these centers will be added to ANGIE in R2 for Family Independence Administration Supplemental Nutrition Assistance Program (FIA SNAP):

- FIA’s SSI Center is **S15**. Cases at this center have specialized budgeting and rules that require special logic.
- FIA's RTC for SNAP (**S61**) includes special processes for RTC applications, case changes and recertification processes. Cases at this center have specialized budgeting and rules that require special logic.

4. Mailer and Match Action Program (MMAP) Processing

FIA’s MMAP group will be integrated with the ANGIE system in R2. This group is responsible for processing periodic reports, mandated matches for active SNAP cases, as well as special projects such as Mass Re-Budgeting (MRB) and other such initiatives.

MMAP staff is enrolled in center **F25** with citywide access. The following roles will be integrated for MMAP:

- Eligibility Specialist
- Supervisor
- Manager
- Regional

5. Home Page: Dashboard for Regional Manager & Business Administrator

Upon login, the landing screen in ANGIE will be the **Dashboard** page. This screen will allow the Regional Manager to view their progress, keep track of their team's progress, access their next priority task and search for cases. It will replace the individual's Paperless Office System (POS) queue.

The screen includes the navigation bar on the left-hand side, the title bar with the Regional Manager's name and the **Tools** menu and the main panel with the Manager's functions. In R2, a new **Intake** link was added in the navigation bar, which opens the new **Intake List**. For additional details on the Intake link and activity, please refer to the release notes for the Eligibility Specialists.

Collapsible widgets appear in the Dashboard, showing:

- **Your Work Counts!**
- **Team Progress**
- **Work Outstanding**
- **Case Search**
- **Get Next Case for Sign-off**
- **Get Next Case for Processing**

The widgets will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

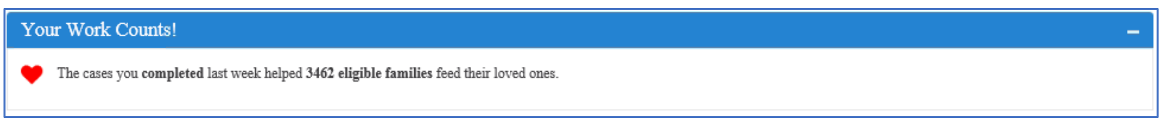
- Widget Name: The name of the respective widget will be displayed.
- Last Updated: Last updated timestamp on when the data was last updated in the format: Last Updated: **mm/dd/yy hh:mm AM/PM.**
- A refresh button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

6. "Your Work Counts!" & "Today's Progress" Widgets for Regional Manager & Business Administrator

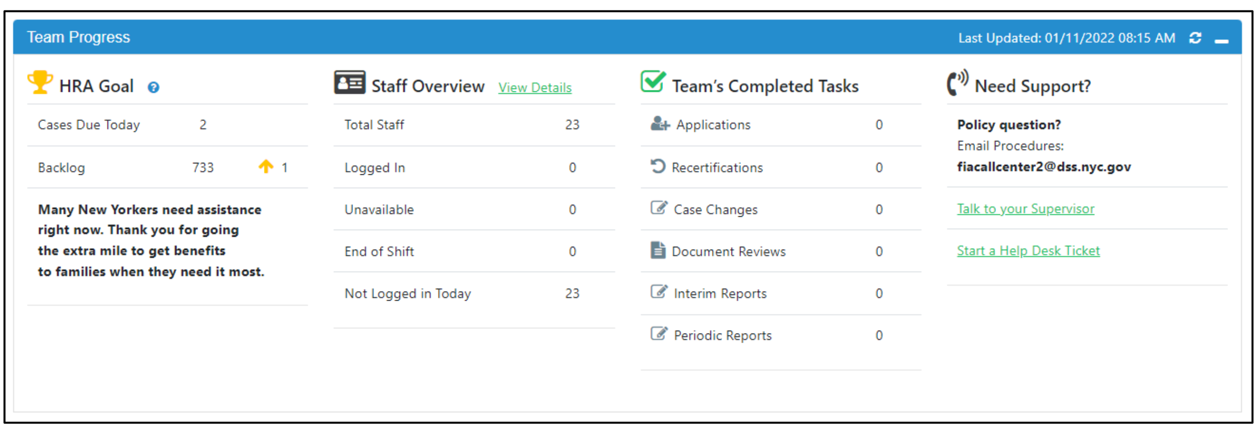
The **Your Work Counts!** widget provides positive messages for the Regional Manager, with information about how many families their work helped in the previous week (first message as seen below) and positive messages from applicants and participants.

The positive messages are from applicants/participants and will be pulled from reviews of the Access Human Resources Administration (AHRA) mobile app in the App Store / Google Play store and also from the AHRA site. The comments will be alternating between these messages. The information displayed within this widget gets updated weekly:

- There will be a table with all possible messages that could be displayed from the sources mentioned. This is a static table that gets refreshed periodically with a new list.
- Each time the Regional Manager logs into ANGIE or returns to ANGIE from Streamlined Paperless Office System (SPOS), either the "The cases you completed last week helped X eligible families feed their loved ones." or that day's HRA message will be displayed. Selection will be random.



The Team progress widget for the Regional Manager consists of four sections including **HRA Goal**, **Staff Overview**, **Team's Completed Tasks**, and **Need Support?** This widget keeps track of the Regional Manager's Team progress throughout the day.



The **HRA Goal** section provides information to the Regional Manager on the **Cases Due Today** and **Backlog**:

- **Cases Due Today** displays all tasks with a Priority Date of Today.
- **Backlog** is displayed as the sum of tasks that are late and overdue.

    - Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday,
    - Arrow down (displayed in green) for a decrease in the backlog since yesterday,
    - No arrow at all (just the backlog number) for no increase or decrease in the backlog number. Where there are zero cases in the backlog for more than one day, the number of days that the backlog has been zero will be counted.
        - This backlog comparison is comparing the start of day backlog number from yesterday to the start of day backlog number from today.
        - The backlog comparison is calculated at 5:30am each day.
        - The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.
- Below the **Cases Due Today** and **Backlog**, there will be text indicating: “Many New Yorkers need assistance right now. Thank you for going the extra mile to get benefits to families when they need it most”.

Help Text displayed for HRA Goal:

HRA Goal shows the overall number of cases due today and backlog across the entire agency.

Backlog includes the cases that have passed their due date. If there is an arrow next to the Backlog number, it indicates a change in the backlog compared to the last workday. The number after the arrow indicates the difference in backlog cases. If it's yellow, HRA has more cases in the backlog than the last workday. If it's green, HRA has fewer cases in the backlog than the last workday.

The **Staff Overview** section provides information to the Regional Manager on their **Total Staff**, **Logged In**, **Unavailable**, **End of Shift**, and **Not logged in Today**. The Regional Manager can get more details in terms of the **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** by selecting the **View Details** link located in this section as seen above, which opens the **Details** screen below.

VIEW STAFF OVERVIEW DETAILS

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM

CLOSE

The **Team's Completed Tasks** section displays the number of **Applications**, **Recertifications**, **Case Changes**, **Document Reviews**, **Periodic Reports**, and **Interim Reports** the Regional Manager's team completed for that day up to the point in which the timestamp is shown in the banner.

The **Need Support?** section provides the email for the Office of Procedures Call Center (fiacallcenter2@dss.nyc.gov) as read-only. Clicking on **Talk to your Supervisor** opens **Microsoft Teams**. Clicking on **Start a Help Desk Ticket** opens the **Self-Service Incident Form** and allows the staff to report any technical issue they may encounter in ANGIE.

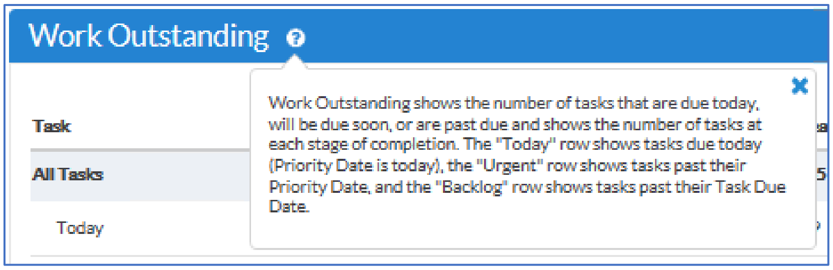
7. Work Outstanding Widget in the Regional Manager & Business Administrator Dashboard

The **Work Outstanding** widget shows the ANGIE work that is outstanding by criticality so that the Regional Manager can review what remains ahead and what was completed. The data shown in the dashboard includes **All Tasks** consisting of rows for **Today** (Priority Date Today), **Urgent** (Late, past Priority Date before/including Task Due Date), and **Backlog** (Overdue, past Task Due Date). The data is split across columns for **Potential Work**, **Open Task**, **Deferred**, **ES Ready**, **Sup Ready**, **Total Open Work**, **Xmitted WMS**, **Pending WMS**, and Completed**.**

Work Outstanding Last Updated: 10/20/2020 11:50 AM

Task	Potential Work	Open Task	Deferred	ES Ready	Sup Ready	Total Open Work	Xmitted WMS	Pending WMS	Completed
All Tasks	**255**	**98**	**96**	**145**	**107**	**446**	**89**	**377**	**225**
Today	0	12	12	29	16	69	19	82	45
Urgent	0	7	7	14	8	36	30	50	41
Backlog	0	56	56	57	56	225	50	184	90

Help Text for the Work Outstanding:



In R2, two new task types will be added:

- Periodic Report – Cases in Active status (**AC**) that must complete a mandated periodic report.
- Interim Report – Cases in AC at center **S15** that must complete a mandated interim report.

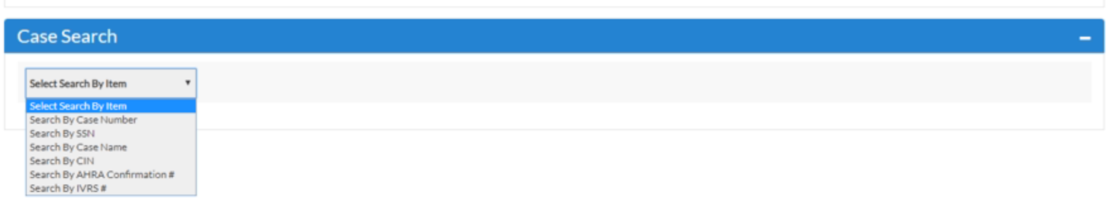
Periodic Reports
Monthly lists of cases due for a periodic report are received from the Welfare Management System (WMS) and will be loaded into ANGIE. ANGIE will track the submission of the online periodic report and indexing of the periodic mailer forms that make cases ready for sign-off, in order to assign the tasks to MMAP supervisors based on the priority and due dates.

Interim Reports
Monthly lists of **S15** cases due for an interim report are received from WMS and will be loaded into ANGIE. ANGIE will track the indexing of the interim report forms that make cases ready for sign-off, in order to assign the tasks to Family Independence Administration Supplemental Nutritional Assistance Program (**FIA SNAP**) supervisors based on the priority and due dates.

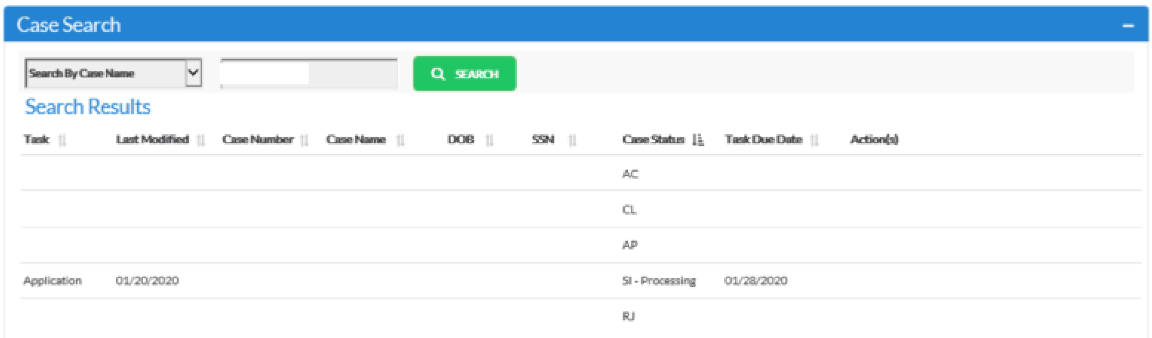
8. Case Search: Manual Assignment of Tasks

To manually assign a task, the Regional Manager must first search for the respective case. The Regional Manager can execute a search based on the following criteria:

- **Case Number**
- **SSN**
- **Case Name**
- **CIN**
- **Access Human Resources Administration (AHRA) Confirmation #**
- **IVRS #** (Interactive Voice Response System for Recertifications)



Based on the criteria selected from the dropdown, the Regional Manager will be required to enter the corresponding information. Upon selecting the **Search** button, the system will display the search results consisting of **Task**, **Last Modified**, **Case Number**, **Case Name, DOB**, **SSN**, **Case Status**, **Task Due Date** and **Action(s)**.



Selecting the desired row will highlight that row. Once the desired row is selected, the Regional Manager can select from available options from the **Action(s)** dropdown and select **Go** to execute. The options available within the **Action(s)** dropdown are dependent on the **Case Status** of the Search result. The search process can result in the following three outcomes:

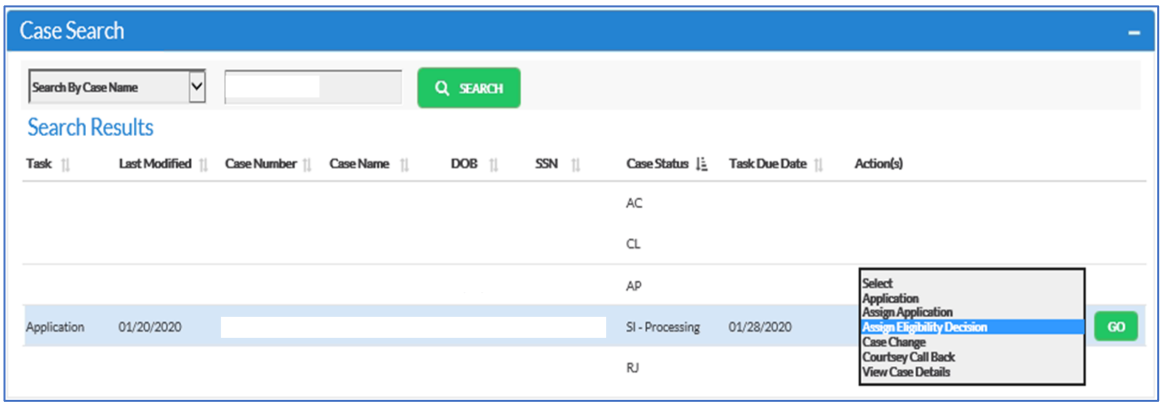
(1) **Open Task**
- Cases with **Open Task** will have information in **Task** and **Last Modified** columns of **Search Results** section
- If the system finds a case with **Open Task**, it will display this case first in the **Search Results** section
- If the system finds multiple cases with **Open Tasks**, it will display these cases first and sorted by earlier date in the **Task Due Date** column

(2) **Latest Task**
- If the system does not return any cases with **Open Tasks** in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
- Cases without **Open Task** are those where these is no information in **Task** and **Last Modified** columns of **Search Results** section

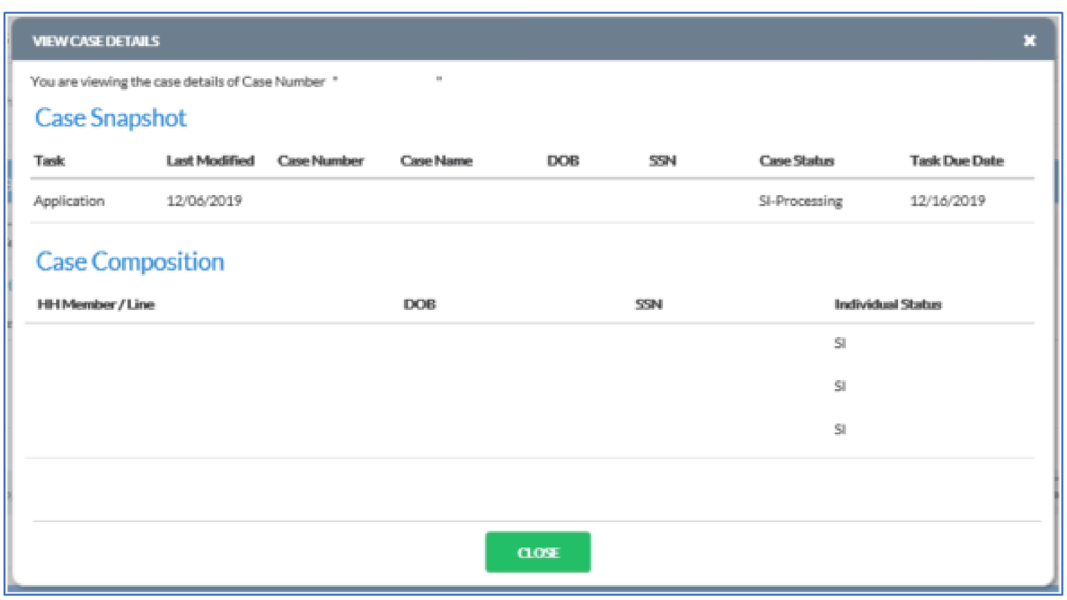
(3) **No Task**
- The system displays the message “No Case found, please refine your search criteria.”

Search Results Actions(s) Combo Box will contain a list of available actions for the Regional Manager. These actions will be table-driven. These tables allow control at the following levels:

- Role of Regional Manager (there are many titles within 1 role) – Streamlined Paperless Office System (SPOS) roles will be leveraged to maintain compatibility with POS queues.
- Center designation of Regional Manager.
- Current WMS case status of selected case in search results.
- List of activities available for the case, based on the case status and open task.



Selecting the **View Case Details** option from **Action(s)** and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**. The columns for the **Case Composition** section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.

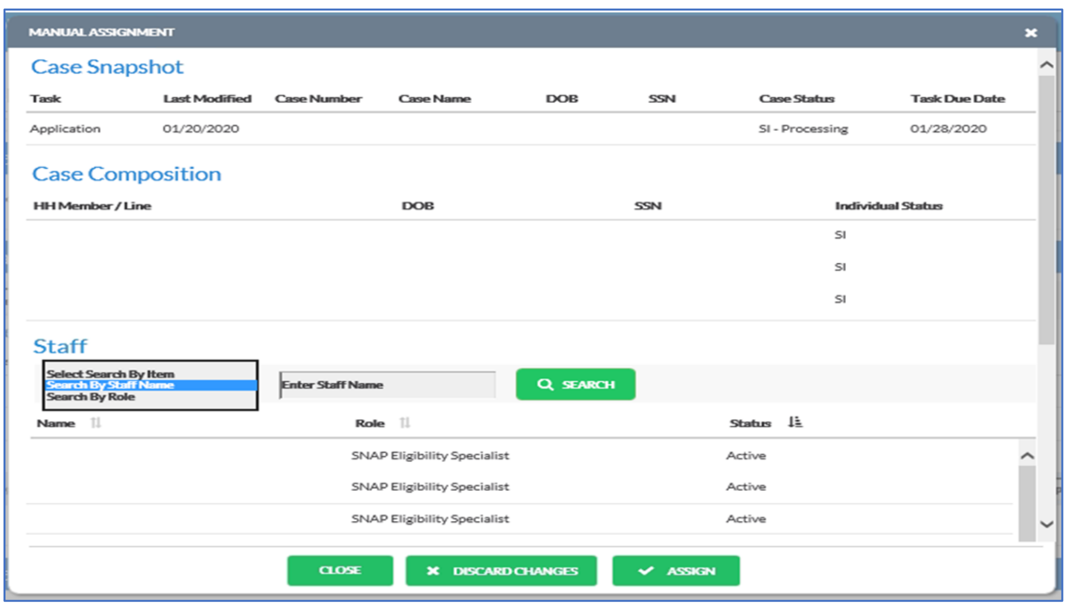


The Regional Manager can manually assign tasks by searching for the case and then selecting the **Assign** option from the **Actions** dropdown. Clicking the **Go** button results in a modal window displaying the **Case Snapshot**, **Case Composition**, along with the **Staff** section as seen below.

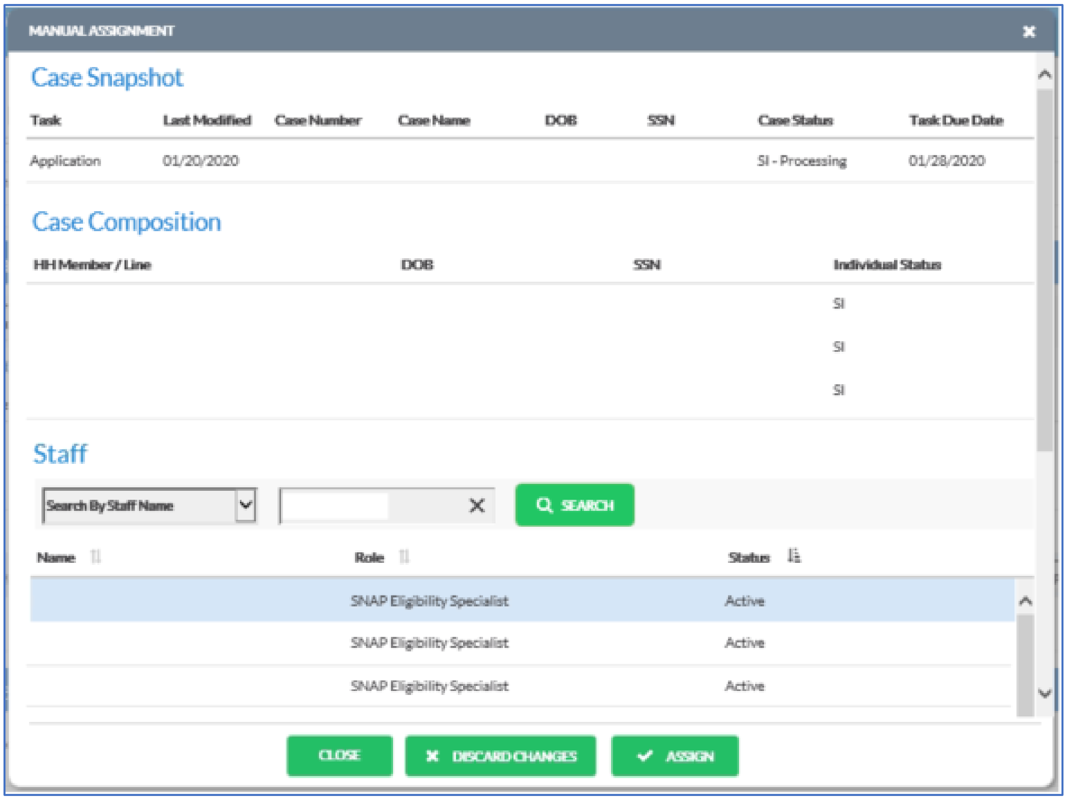
The columns for the **Case Snapshot** section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**.

The columns for the **Case Composition** section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**. Within the **Staff** section, the Regional Manager can search for the Staff based on **Staff Name** or **Role** and then select the intended staff within the grid.

- If **Name** is selected, then the Regional Manager must enter the name as seen below.
- If **Role** is selected, the Regional Manager must select an option from the Role dropdown consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, or **Clerical Associate**. Selecting the **Search** button will display the search results in the grid. The sortable columns displayed in the Staff section include **Name**, **Role**, and **Status**.



Once a row is selected for the intended staff, it will highlight that row and selecting the **Assign** button will assign the task to that staff.



The Regional Manager will see a green banner to inform them that the task has been successfully assigned.

9. Case Search: Search for Pending Approvals

The Regional Manager will be able to search for pending approvals in the ANGIE Case Search and will be able to start the approvals. This will allow for sign-off of cases that may need to be processed ahead of their priority order.

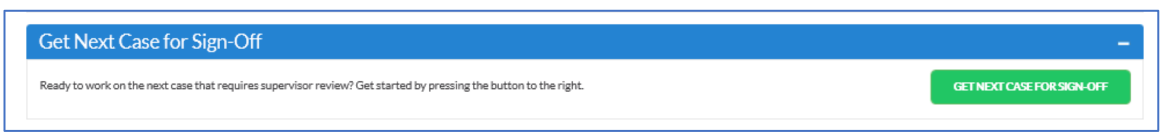
10. Case Search: New Warning Messages for Duplicate Activities

When staff selects an activity other than **Review Case** and **View Details** in **Case Search**, ANGIE will confirm whether the same activity was already completed as part of the current task when the **Go** button is clicked and before launching SPOS.

- If the same activity was already completed in the current task, ANGIE will display the following warning message: “This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?”
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the Case Search will be reset.
- For recertification tasks, if the recertification due date is more than 4 months in the future, ANGIE will display the following warning message: “This activity was already completed for this task. You may be starting a duplicate activity. Continue to SPOS?”
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No**, SPOS will not open and the **Case Search** will be reset.
- If there was a transmission to WMS on the current day from SPOS, then ANGIE will display the following warning message: “There was a transmission to WMS for this case today. You may be starting a duplicate activity. Continue to SPOS?”
  - If the staff click **Yes**, SPOS will open.
  - If the staff clicks **No,** SPOS will not open and the **Case Search** will be reset.

11. Get Next Case for Sign-off: Next Approval Task for Regional Manager & Business Administrator

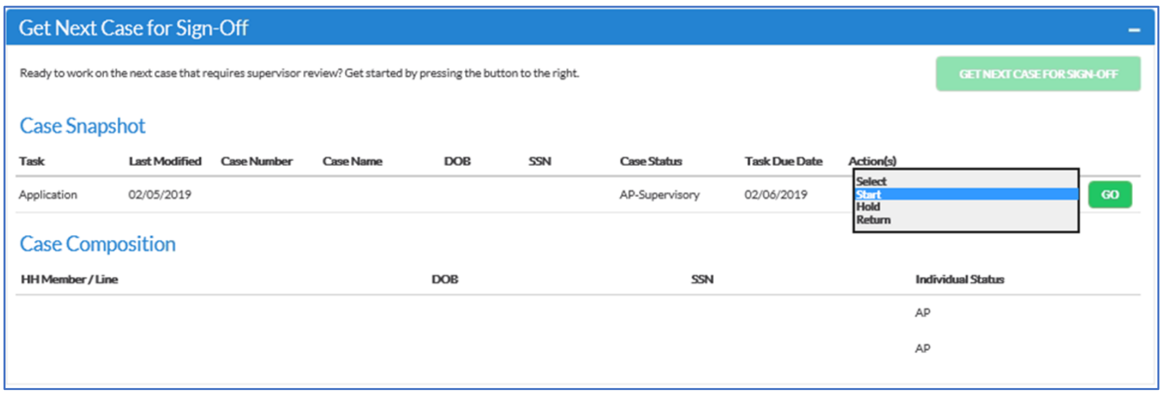
The Regional Manager will get the next task to approve by selecting the **Get Next Case for Sign-off** button located within the dashboard. The approval tasks that are distributed to the Regional Manager will be based on the priority logic.



- Once the button is clicked, the Regional Manager will see a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date,** and **Action(s)**. The columns for the **Case Composition** section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.
- The Regional Manager will be able to start the **Approval** task by selecting the **Start** option within the Action(s) dropdown, and then selecting the **GO** button.

The ANGIE system will then launch the SPOS application for the Regional Manager to approve the respective task.

- In R2, the **Task** column was updated to provide additional detail about the assigned work. For example, it will inform the staff if the assigned task is an error correction.
  - Previously, it only informed the staff that an application, recertification, change case or document review task was assigned.
- In R2, two new task types will be added: **Periodic Report** and **Interim Report**.



12. Get Next Case for Processing for Regional Manager

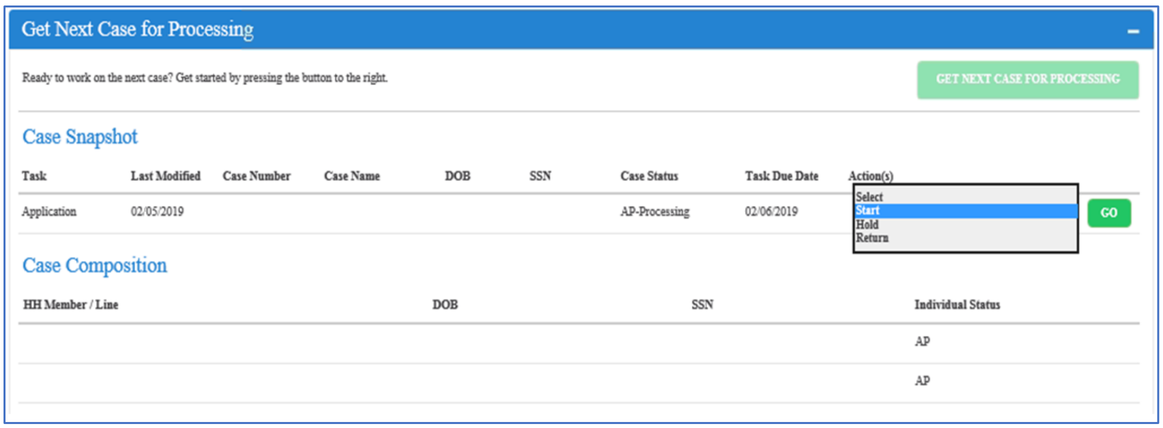
The Regional Manager can step down to the role of the Eligibility Specialist and function as an Eligibility Specialist. The tasks that are allocated to Regional Managers within this widget, are non-approval tasks. This function will allow the Regional Manager to help the Eligibility Specialists perform their tasks when additional manpower is needed.

- Selecting the **Get Next Case for Processing** button located within the dashboard will distribute a non-approval task based on the priority logic.

- Once the button is clicked, the Regional Manager will see a case profile consisting of **Case Snapshot** and **Case Composition** as seen below. The columns for the **Case Snapshot** section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date**, and **Action(s)**. The columns for the **Case Composition** section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**.
- The Regional Manager will be able to start the task by selecting the **Start** option within the Action(s) dropdown, and then selecting the **GO** button. The ANGIE

system will then launch the SPOS application for the Regional Manager to work on the respective task.

- In R2, the **Task** column was updated to provide additional detail about the assigned work. For example, it will inform the staff if the assigned task is an error correction.
  - Previously, it only informed the staff that an application, recertification, change case or document review task was assigned.
- In R2, two new task types will be added: **Periodic Report** and **Interim Report**.



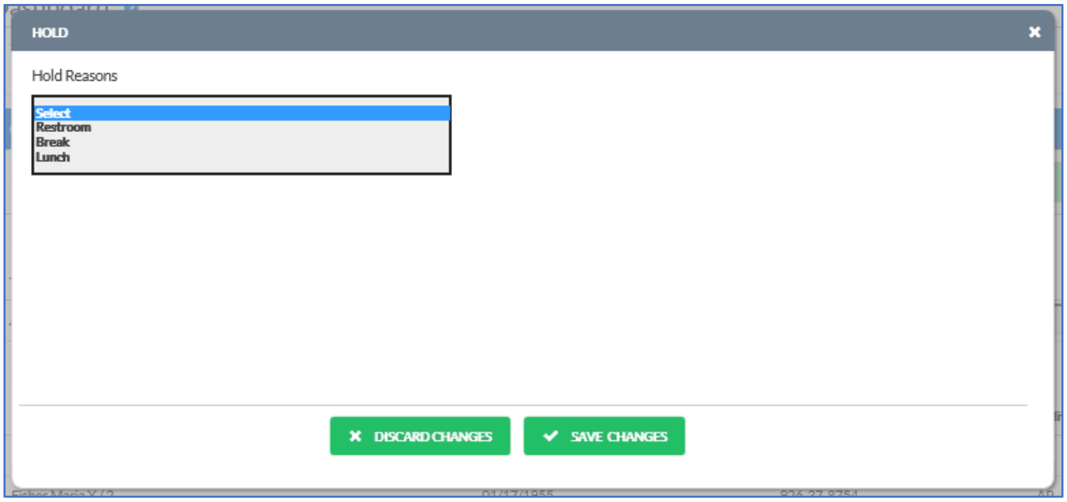
13. Hold or Return Task

The Regional Manager can execute a **Hold** or **Return** on a task and is applicable to both the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets.

- The Regional Manager can execute a hold on a task by selecting the **Hold** option from the **Action(s)** dropdown and clicking the **Go** button. The Regional Manager will see a modal window and must select from the available Hold Reasons (**Restroom**, **Break**, **Lunch**).

Once the Regional Manager selects the applicable hold reason and then selects **Save Changes,** the hold will be applied on the respective task for a set time (two hours), for that Regional Manager. **Note**: The Regional Manager cannot work on another “prioritized task” until the hold task is worked.

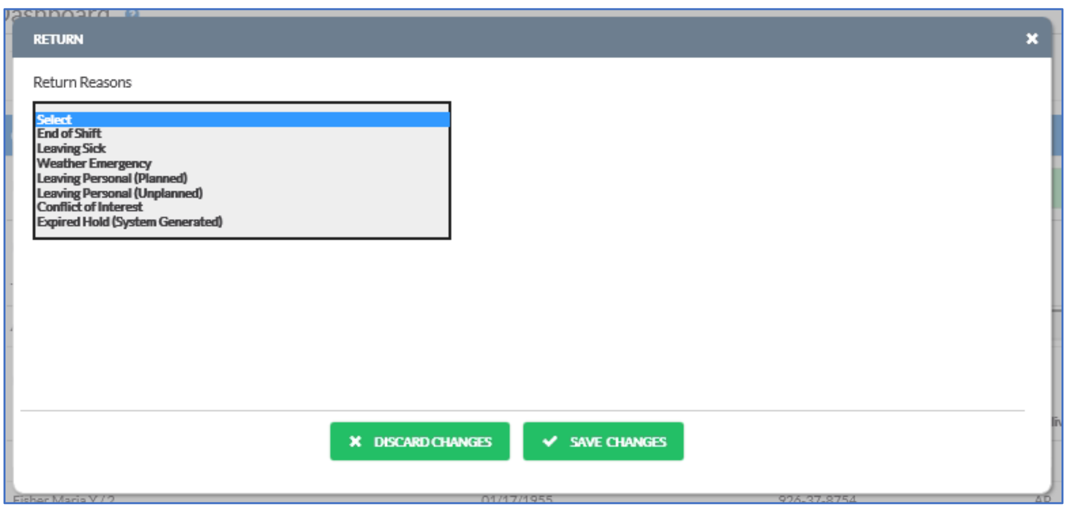
If the Regional Manager returns within the set time, the Regional Manager will be provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task will be placed back in the general pool and another Regional Manager may have access to that task.



- The Regional Manager can return a task by selecting the **Return** option from the **Action(s)** dropdown and clicking the **Go** button.

The Regional Manager will see a modal window and required to select from the available Return Reasons (**End of Shift**, **Leaving Sick**, **Weather Emergency**, **Leaving Personal (Planned)**, **Leaving Personal (Unplanned)**, **Conflict of Interest**, **Expired Hold (System Generated)**).

- After selecting the applicable return reason and clicking the **Save Changes** button, the task will be returned to the general pool and another Regional Manager can get the task.

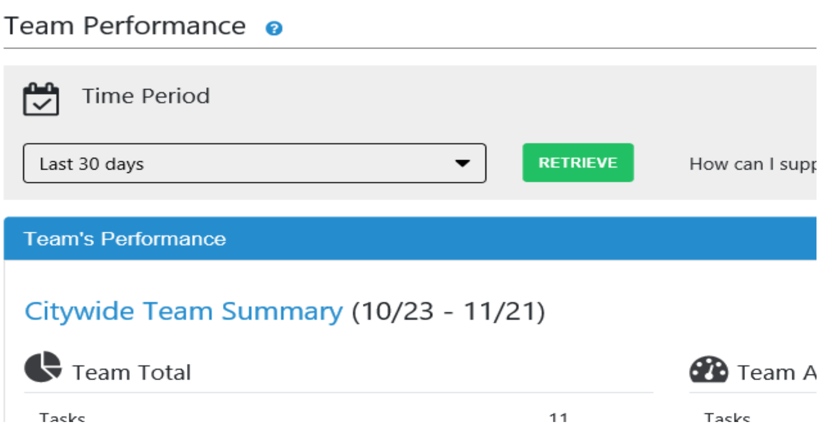


14. Team Performance Page for Regional Manager & Business Administrator

The Regional Manager can access their **Team Performance** page from the left navigation pane. This page will provide metrics to gauge the team's performance and allow the Regional Manager to drill-down from the **Citywide** view (default) to

Regional Manager view, **Manager view**, **Supervisor view**, and finally to the **Eligibility Specialist view**. In R2, information about supervisor returns was added.

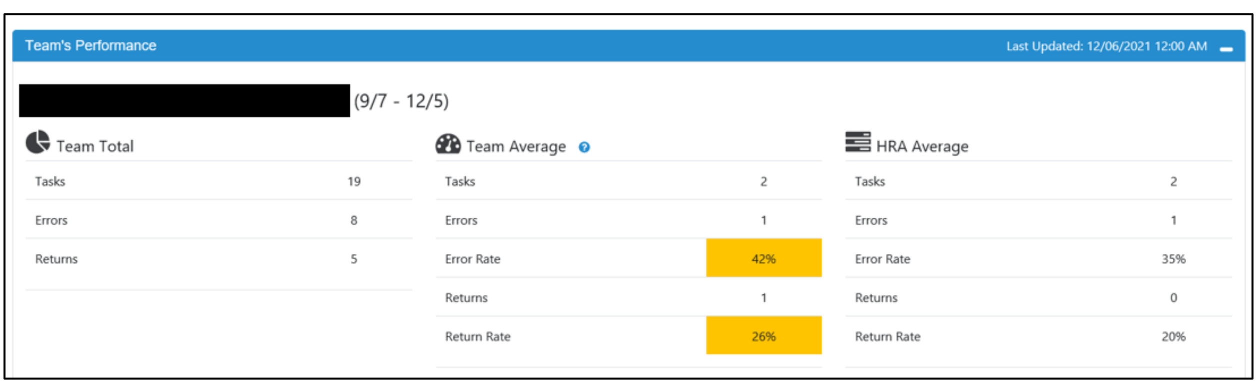
The page consists of the **Timeframe Selector,** the **Accuracy – WMS Error Rate** widget and the new **Accuracy – Supervisor Returns** widget as seen below.



The Regional Manager will start with the **Citywide view** as the default view on this page as seen above. This page consists of **Citywide Team Summary** and **Citywide Staff Detail** sections.

The **Citywide Team Summary** section of the page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, the **Error rate** as a percentage, the number of **Returns**, and the **Return rate** as a percentage.

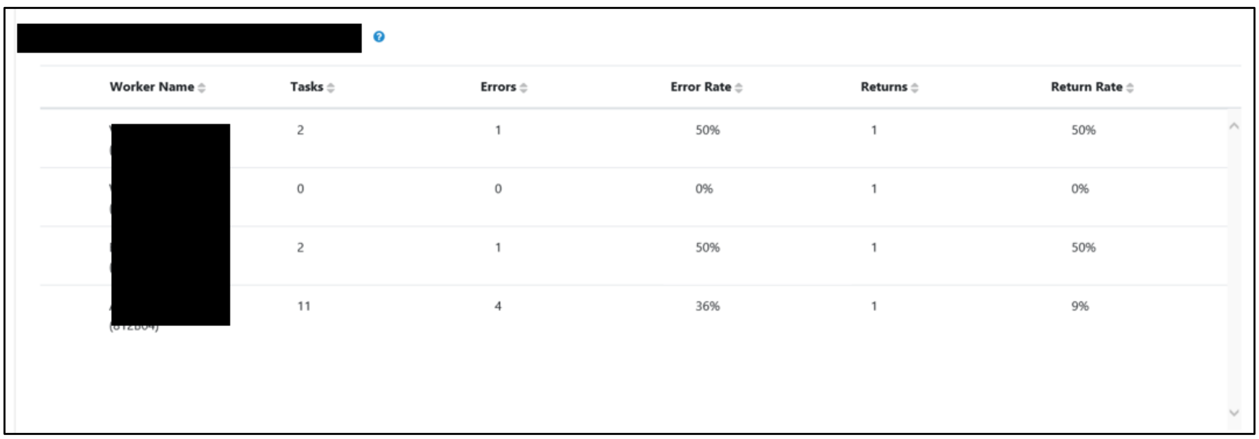
- The Error Rate for the **Team Average** table will be displayed within green, yellow, or blue boxes to indicate if the team's WMS Error Rate is above, below, or same as the **HRA Average**, respectively.
- The **Return Rate** for the **Team Average** table will be displayed within the green box, yellow box, or blue box to indicate if the team's **Supervisor Return Rate** is above, below, or same as the **HRA Average** respectively.



The **Citywide Staff Detail** section contains columns for **Regional Manager Name**, **Tasks**, **Errors**, **Error Rate**, **Returns** and **Return Rate.** To the left of the Regional Manager Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in need of improvement.
- **Green Star icon** shows above average performance.

- Selecting the name within the **Regional Manager Name** column in the **Citywide view** will give access to the selected **Regional Manager view**.
- Consequently, depending on the name selected for drill-down, the **Team Summary** values on top changes to show the selected **Regional Manager's Team** Summary.
- The **Staff Detail** section on the bottom of the page changes to show the selected **Regional Manager's Staff Detail** as seen in below screen.


[redacted]

Worker Name	Tasks	Errors	Error Rate	Returns	Return Rate
[redacted]	2	1	50%	1	50%
	0	0	0%	1	0%
	2	1	50%	1	50%
	11	4	36%	1	9%

The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, the **Error rate** as a percentage, the number of **Returns**, and the **Return rate** as a percentage.

- The **Error Rate** for the **Team Average** table will be displayed within green, yellow, or blue boxes to indicate if the selected team's **WMS Error Rate** is above, below, or same as the **HRA Average**, respectively.
- The **Return Rate** for the **Team Average** table will be displayed within the green box, yellow box, or blue box to indicate if the team's **Supervisor Return Rate** is above, below, or same as the **HRA Average** respectively.

Navigating each view:

- The **Regional Manager view** will contain the name of the selected Regional Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Regional Manager.

    - From the **Regional Manager view** (above screen), the Manager can access the **Manager view** by selecting the name within the **Manager Name** column and view the details for the manager's team.
- The **Manager view** will contain the name of the selected Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Manager.
    - From the **Manager view** (above screen), the Manager can access the **Supervisor view** by selecting the name within the **Supervisor Name** column.
- The **Supervisor view** will contain the name of the selected Supervisor in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the **Team performance** page of the selected Supervisor.
    - From the **Supervisor view** (above screen), the Manager can access the **Eligibility Specialist view** by selecting the **Errors** and **Error Rate** values for the respective Eligibility Specialist.
- The **Eligibility Specialist view** will contain the name of the selected Eligibility Specialist on the widgets **Accuracy – WMS Error Rate** and **Most Common WMS Errors**.
    - Selecting **Close** will return Manager to the **Supervisor view.**
- Selecting **Back** will Navigate the Manager to the previous page.
- Selecting **Back to Citywide Summary** will navigate to the **Citywide view**.

15. Team's Daily Activity for Regional Manager & Business Administrator

The **Team's Daily Activity** page can be accessed by the Regional Manager from the left navigation pane. This page starts with the **Citywide view** for the Regional Manager and consists of **Activity Summary – Citywide** and **Activity Detail – Citywide** widgets as seen below.

Team's Daily Activity

Activity Summary - Citywide — Last Updated: 01/24/2022 10:38 AM

Staff Overview	View Details
Total Staff	244
Logged In	5
Unavailable	1
End of Shift	0
Not Logged in Today	238

Tasks Status	
Initiated	2
In Progress	0
Incomplete	2
Complete	0

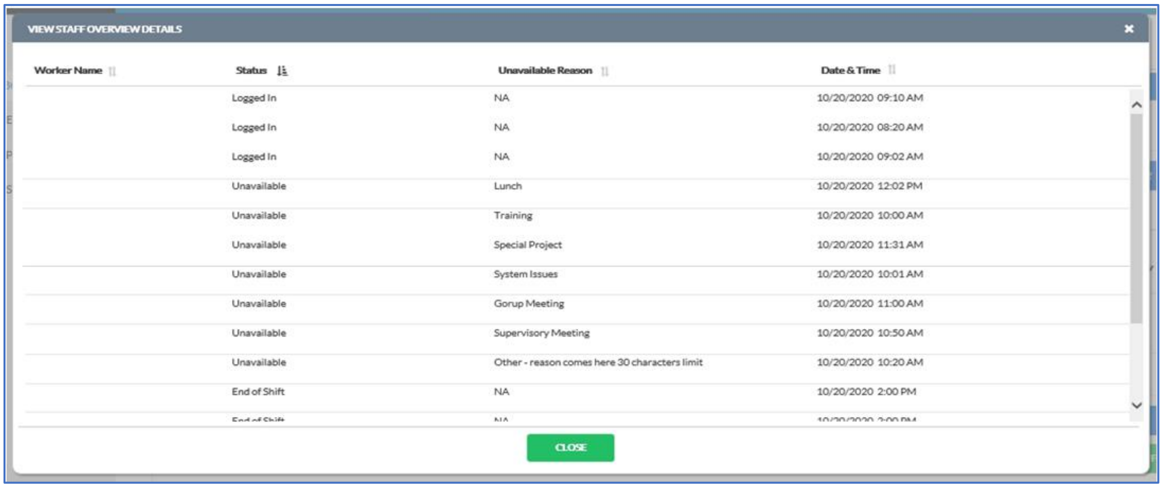
Tasks Completed	
Completed Interviews	0
Completed Application Processing	0
Completed Recertification Processing	0
Completed Case Changes	0
Completed Document Reviews	0
Completed Periodic Reports	0
Completed Interim Reports	0

Activity Detail - Citywide — Last Updated: 01/24/2022 10:38 AM

Regional Manager Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews	Interim Report	Periodic Report
	0	2	0	0	0	0	0	0	0	0
Total	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

The **Activity Summary – Citywide** widget consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the **Total Staff, Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. The **Tasks Status** table provides information on the number of tasks that are **Initiated**, **In Progress**, **Incomplete**, and **Complete**. The **Tasks Completed** table provide the number of tasks that are completed for **Interviews**, **Applications**, **Recertifications**, **Case Change**, **Document Reviews**, **Periodic Reports** and **Interim Reports**.

A **View Details** link is provided within the **Staff Overview** table that will provide details of staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today.** Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** as seen below will display. Selecting **Close** will return the Regional Manager to the default **Citywide view** of the **Team's Daily Activity** page.



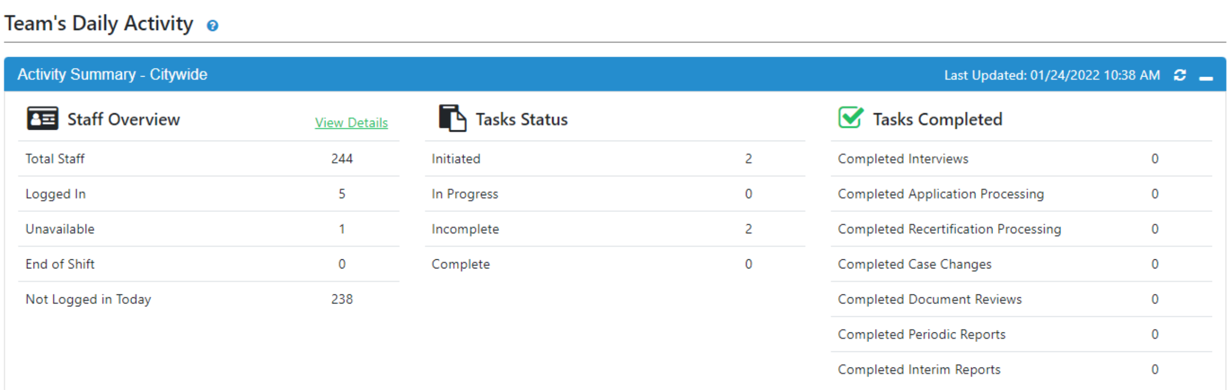
VIEW STAFF OVERVIEW DETAILS

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM

CLOSE

The default view of the **Activity Detail – Citywide** widget shows columns for **Regional Manager Name**, **Tasks in Progress, Tasks Incomplete**, **Tasks Complete**, **Interview**, **Application**, **Recertification**, **Case Change**, **Document Reviews**, **Periodic Reports** and **Interim Reports**.

The **Regional Manager Name** column are links and upon selection, the Regional Manager can view the selected **Regional Manager's Team's Daily Activity** page as seen below.



Team's Daily Activity

Activity Summary - Citywide — Last Updated: 01/24/2022 10:38 AM

Staff Overview	View Details
Total Staff	244
Logged In	5
Unavailable	1
End of Shift	0
Not Logged in Today	238

Tasks Status	
Initiated	2
In Progress	0
Incomplete	2
Complete	0

Tasks Completed	
Completed Interviews	0
Completed Application Processing	0
Completed Recertification Processing	0
Completed Case Changes	0
Completed Document Reviews	0
Completed Periodic Reports	0
Completed Interim Reports	0

In the Regional Manager view (above screen), the selected Regional Manager's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected **Regional Manager's Team's Daily Activity**.

The **Activity Summary** widget for the selected Regional Manager consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**.

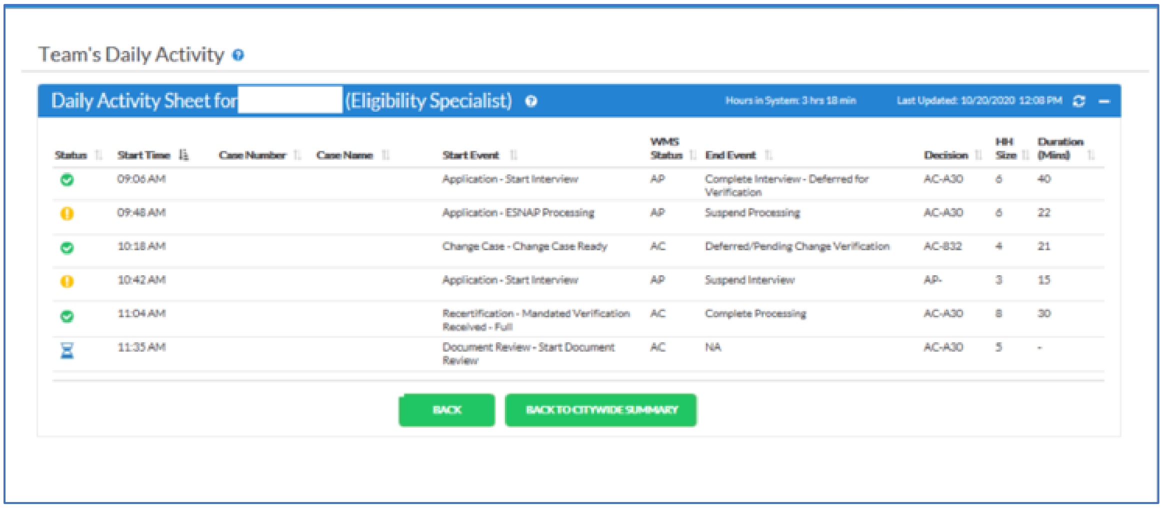
- The **Staff Overview** table provides an inventory of the **Total Staff**, **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**.

- The **Tasks Status** table provides information on the number of tasks that are Initiated, In **Progress**, **Incomplete**, and **Complete**.
- The **Tasks Completed** table provide the number of tasks that are completed for **Interviews**, **Applications**, **Recertifications**, **Case Changes**, and **Document Reviews.**
- In the **Tasks Completed** section, the labels were updated to add the word **Completed** before each task type and **Completed Periodic Reports** and **Completed Interim Reports** were added.

A **View Details** link is provided within the **Staff Overview** table that will provide details of the Regional Manager's staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today.** Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** will display.

The **Activity Detail** widget for the selected Regional Manager shows columns for **Manager Name**, **Tasks in Progress**, **Tasks Incomplete**, **Tasks Complete**, **Interview**, **Application**, **Recertification**, **Case Change**, and **Document Reviews**. The **Manager Name** column contains links and upon selection, the Manager can drilldown to the selected **Manager's Team's Daily Activity** page as seen below. Selecting **Back to Citywide Summary** in above screen navigates the Manager to the default **Citywide view** (above screen). In the **Activity Detail** section, the **Interim Report** and **Periodic Report** task types were added.

- In the **Manager view**, the selected Manager's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected **Manager's Team's Daily Activity**. The Manager can drill down to the Supervisors under the selected Manager.
- In the **Supervisor view**, the selected Supervisor's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected **Supervisor's Team's Daily Activity**. The Manager can also view the **Daily Activity Sheet** for individual Eligibility Specialists from the **Supervisor view**.



Status	Start Time	Case Number	Case Name	Start Event	WMS Status	End Event	Decision	HH Size	Duration (Mins)
	09:06 AM			Application - Start Interview	AP	Complete Interview - Deferred for Verification	AC-A30	6	40
	09:48 AM			Application - ESNAP Processing	AP	Suspend Processing	AC-A30	6	22
	10:18 AM			Change Case - Change Case Ready	AC	Deferred/Pending Change Verification	AC-832	4	21
	10:42 AM			Application - Start Interview	AP	Suspend Interview	AP-	3	15
	11:04 AM			Recertification - Mandated Verification Received - Full	AC	Complete Processing	AC-A30	8	30
	11:35 AM			Document Review - Start Document Review	AC	NA	AC-A30	5	-

- The name of the selected Eligibility Specialist is seen on the **Daily Activity Sheet** widget.
- The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist's daily activity as a snapshot of the work completed for the current day.
- This allows the Manager to review the respective Eligibility Specialist's daily progress.

The Daily Activity Sheet provides information on the **Status**, **Start Time**, **Case Number**, **Case Name**, **Start Event**, **WMS Status**, **End Event**, **Decision**, **HH Size**, and **Duration** (Mins):

- **Status**: The icons within this column provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation) and **In-Progress** (blue hourglass).
- For an Interview, the Status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.
- For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
- When an event is currently in progress:
    - ➢ Duration column for that row displays a dash (minus sign).
    - ➢ End Event column for that row displays "**N/A**".
- **Start Time**:
- Displays the time that the event was started in the format: **hh:mm AM/PM.**
- The default view will be based on the ascending order of Start Time.
- **Case Number**: This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
    - For **Application** and **Recertification** Task:

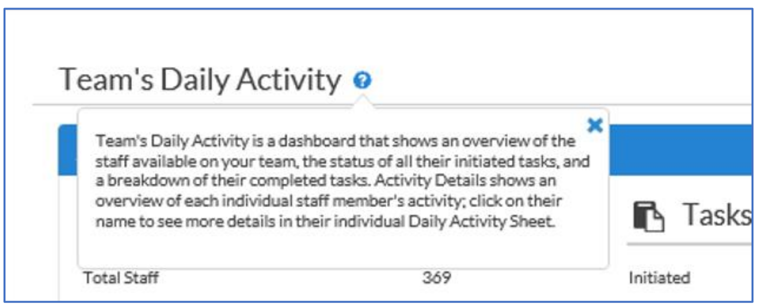
    - ➢ Interview Started - If an Interview was either distributed from **Get Next** or started from **Case Search**, the element must display "Interview Started".
    - ➢ Ready to Assign Event - For any case that was distributed and started from the **Get Next** button, the **Ready to Assign Event** must be displayed. For example, "Mandated Verification Received – Full" event.
    - ➢ SPOS Activity - For any Events that were started from **Case Search**, the **SPOS Activity** must be used. For example, "Application Modification", "Make Case Comment", etc.
  - For **Change Case**, **Periodic Report** and **Interim Report:** The start event is typically: "Change Case Ready" (if started from Get Next) or "Start Processing" (if started from Case search).
  - For **Document Review**, the start event is always: "Start Document Review".
- **WMS Status**: The existing WMS case status (starting state) – Applying (**AP**), Denied (**RJ**), Single Issue (**SI**), Active (**AC**), Closed (**CL**).
- **End Event:** The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.
  - For any start events in the status of **Interview** in the **Event Log**, the **End Event** is always either: **Suspend Interview** or **Complete Interview**.
  - For **Change Case** events, the system checks whether a Deferral was made in the **Pending** status events; if yes, then the end event is "Deferred/Pending Change Verification". Otherwise, the last event with a status of **Processing** is used.
  - For other **Processing-related** start events other than **Change Case**, the **End Event** is recorded when the Processors finishes their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).
  - The **End Event** can be **Complete Interview**, **Suspend Processing** or **Complete Processing**. The **End Events** will have the exact outcome, with the possible values displayed below. The event log will also get updated accordingly.
    1. Complete Interview - No deferral
       Complete Interview - Deferred for verification
       Complete Interview - Deferred for IVS/RFI/SDX
       Complete Interview - Deferred for verification and IVS/RFI/SDX
       <u>Note:</u> For the Interview, the **End Event** will be the latest event in status of Interview

    2. Suspend Processing - Deferred for change verification
       <u>Note:</u> For processing actions, the **End Event** will be the latest event in status of Processing
  - For cases that are "In Progress", the **End Event** column will reflect N/A for the respective row.
- **Decision:** This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.

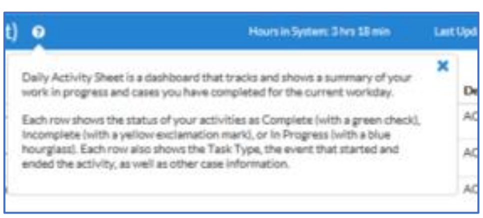
  - The decoded value is needed. For example: **AC-A30** (Same Approval each month), **RJ-V21** (Failure to Provide Verification), **SI-Q22** (Expedited Pending Verification).
  - The description of the code will not be included.
  - If there is no SPOS decision code, then the reason code will be blank. For example, “Application Pending (AP)- “, “Active (AC)-“
- **HH Size** Number of people in AP, Single Issue (SI) or AC status in associated with the Welcare Management System (WMS) case.
- **Duration (Min):** This value will be the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
  - For cases that are “In Progress”, the duration field will be a dash (minus sign) for the respective row.

- Selecting **Back** navigates the Manager to the previous page.
- Selecting **Back to Citywide Summary** navigates Manager to the default Citywide View.

Help Text - Team’s Daily Activity Page



Help Text on Eligibility Specialist’s Daily Activity Sheet:



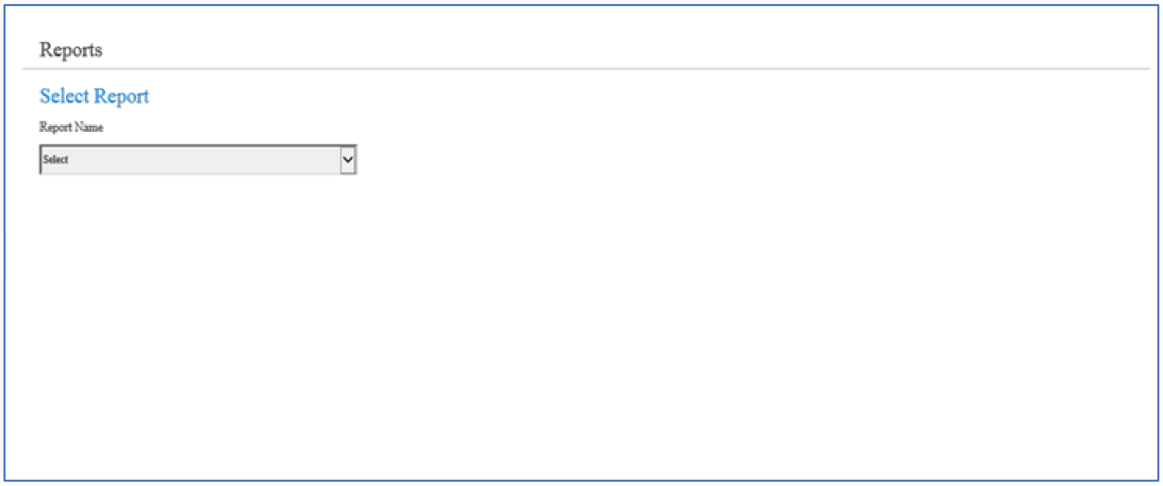
16. Batch Hold of Error Correction Task Assignments for WMS Issues

With certain releases and mass transactions, there are instances when large number of the same type of errors occur that WMS automatically fixes and reprocesses. When this type of situation occurs and WMS informs Department Social Services Information technology Services (DSS ITS), the ANGIE development will hold the affected error correction tasks and stop the assignments through a new backend batch process, to prevent transaction conflicts with the automated WMS fixes.

17. Reports Page

The Regional Manager possessing the skillset of **See Reports** will have access to the **Reports** page and can generate the following reports:

- **Daily Activity**
- **Deferrals**
- **Staff Overview**
- **Timings**
- **Work Outstanding**



New reports will be added in R2:

- Performance Management – Supervisor Returns
- Performance Management – WMS Errors
- Performance Management – Deferrals
- WMS Transmissions
- Selective Case Review Summary
- Selective Case Review Details

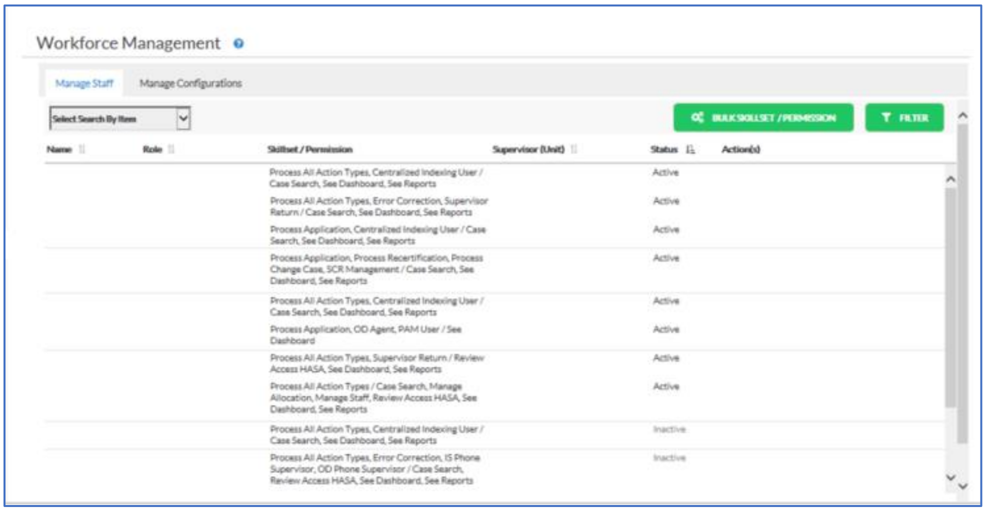
Reports will be covered in detail in a separate document.

18. Business Administrator: Workforce Management

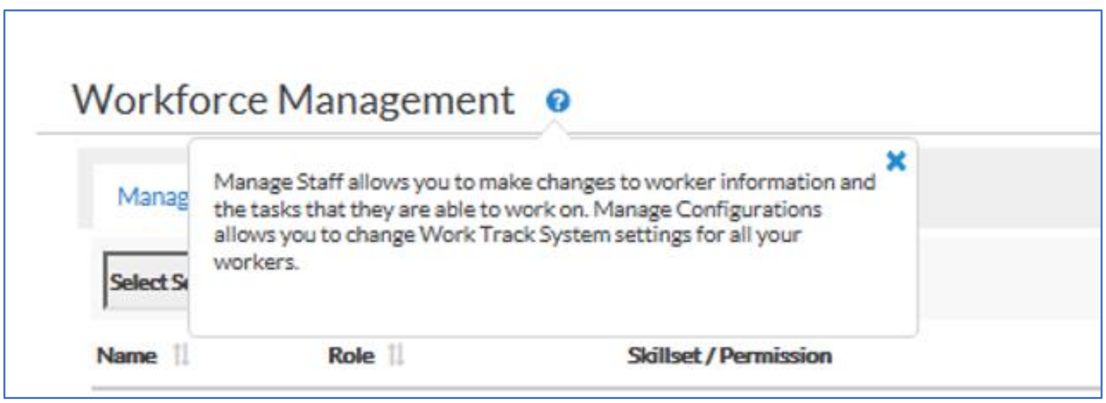
Regional Managers and Managers with a skillset of **Business Administrator** will have access to the new **Workforce Management** option in the left navigation pane, with **both tabs enabled** (Manage Staff, Manage Configurations).

The **Workforce Management** access is also controlled by 2 specific skillsets for a Role that is **NOT** marked with the **Business Administrator** skillset:

- **Manage Staff** - This interface allows updates to staff information in terms of **Name**, **Role**, **Supervisor (Unit)**, **Status**, **Skillset**, and **Permission**. Access is controlled through the skillset of **Manage Staff.** This skillset provides access to the Workforce Management Interface using the navigation bar in ANGIE.
- **Manage Configurations** - This interface allows changes to configuration menus and values. Access is controlled through the skillset of **Manage Configurations.** This skillset provides access to the Workforce Management Interface using the navigation bar in ANGIE.

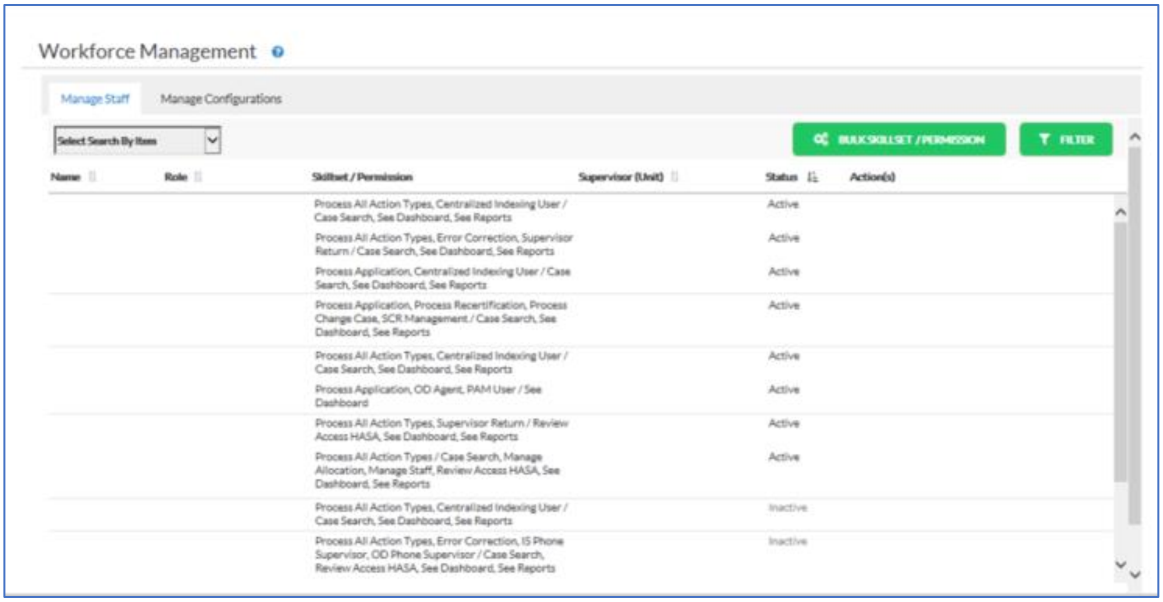


Help Text for the Workforce Management Page:



19. Business Administrator: Manage Staff

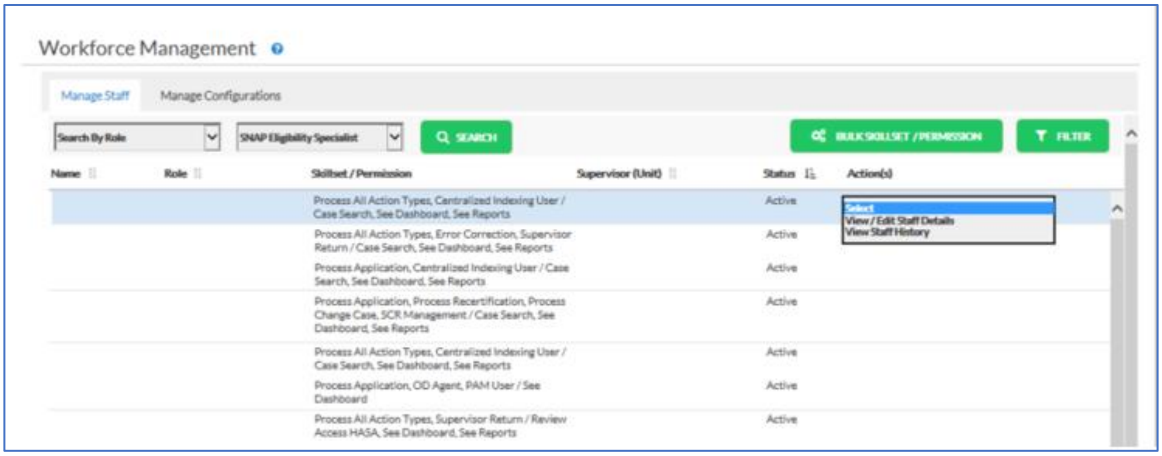
The **Manage Staff** tab allows the Business Administrator to make updates to the staff in terms of their **Name**, **Role**, **Supervisor (Unit)**, **Status**, **Skillset**, and **Permission**.



The Business Administrator can search by **Staff Name**, **Role**, or **Skillset/Permission** to generate a more refined search result. The search results are displayed within the grid.

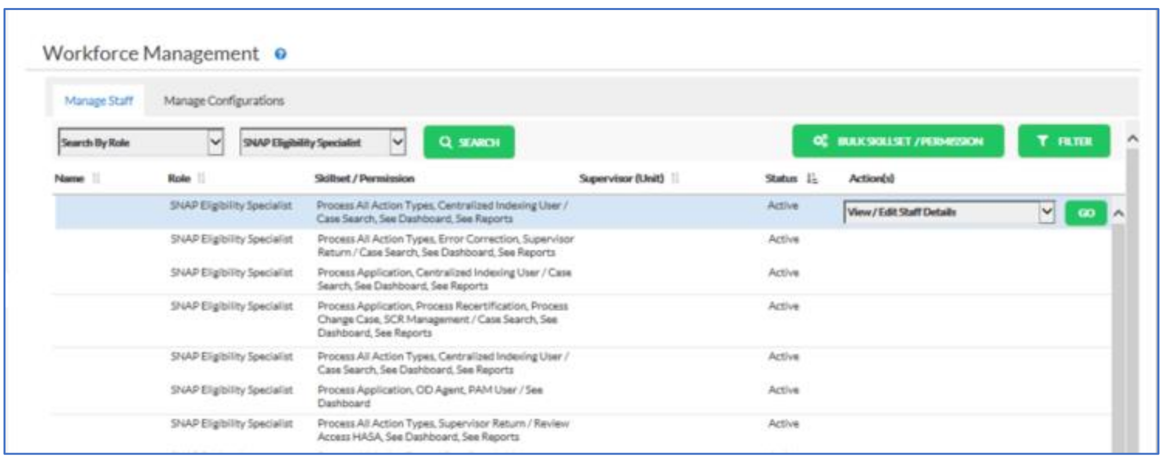
- If **Search by Staff Name** is selected from dropdown, the Business Administrator must enter the desired staff name and select the **Search** button to generate the result.
- If **Search by Role** is selected from dropdown, the Business Administrator will see a **Role** dropdown consisting of SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, and Clerical Associate. Selecting the desired **Role** and then clicking the **Search** button will generate the result within the grid.
- If **Search by Skillset/Permission** is selected from the dropdown, the Business Administrator will see a **Skillset/Permission** dropdown and must select the desired **Skillset/Permission**. Selecting the desired **Skillset/Permission** and then clicking the **Search** button will generate the result within the grid.

From the grid, the Business Administrator must select the desired row to gain access to the options within the corresponding **Action(s)** dropdown consisting of **View Edit Staff Details** and **View Staff History**. Selecting the row will highlight that row. After selecting the desired action, the Business Administrator can select the **Go** button to view the corresponding modal window.



20. Business Administrator: View/Edit Staff Details

- To view and edit Staff details, the Business Administrator must select the row from the **Manage Staff** grid and then select the option **View/Edit Staff Details** from the **Action(s)** dropdown as seen below. The selected row will be highlighted within the grid.



After selecting the **View Edit Staff Details** within **Action(s)** and the **Go** button will result in the modal window displaying (as shown below) allowing the Business Administrator to make changes to the respective Staff's personal information. This interface allows making updates to the **Name**, **Role**, **Supervisor (unit)**, **Status**, **Skillset**, and **Permission**. The changes will be applied upon selecting the **Save Changes** button.

Skillset allows the Role to perform a task or action in SPOS whereas **Permission** allows the Role to access certain features within ANGIE (e.g., Reports, workforce management, **Case Search** etc.) A default set of **Skillsets** and **Permissions** are maintained in a table-driven manner at the level of each role and processing group (e.g. Role's center). This default set of **Skillset**s and **Permissions** can be updated through table updates. New users receive this default set of **Skillsets** and

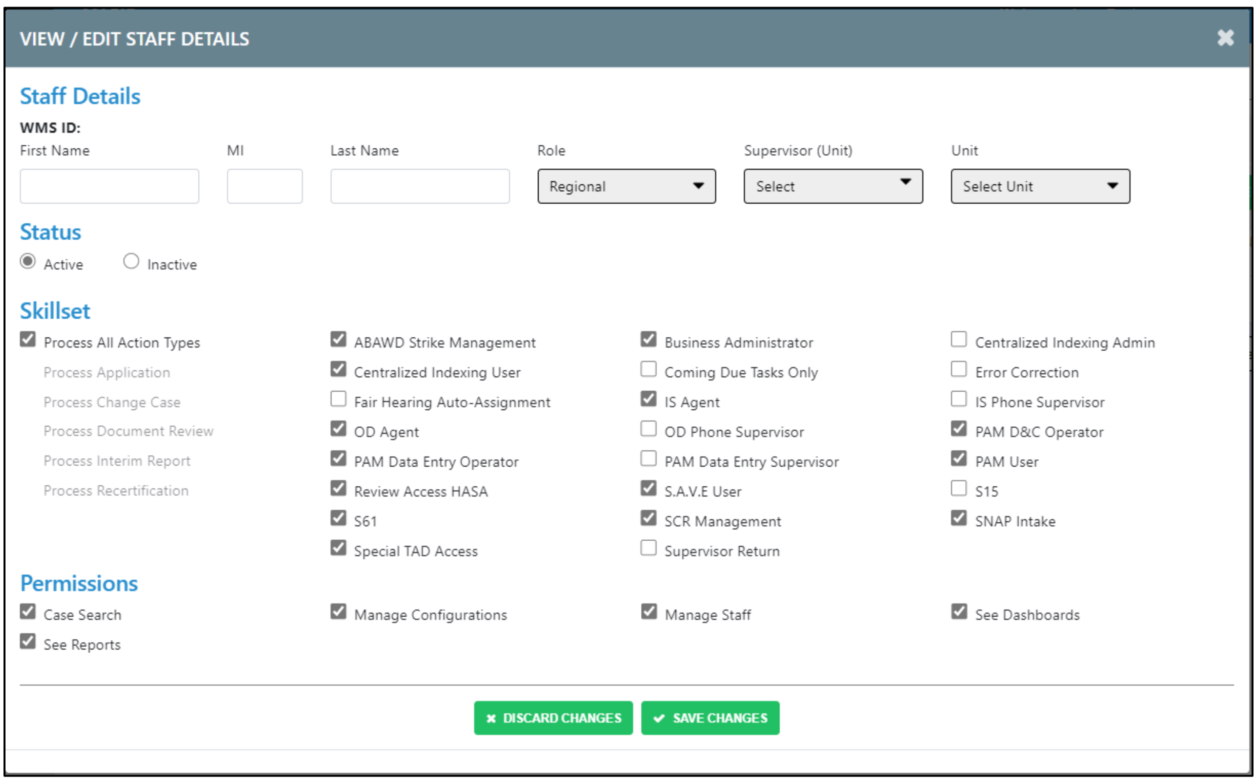
Permissions when they are added in ANGIE. **Skillset** and Permission values can be updated by a Business Administrator or by a staff person with the permission to Manage Staff.

The default set of skillsets and permissions does not override the values assigned to staff who already exists in ANGIE.

All updates that are made within the ANGIE system are also reflected within the **POS Enrollment Special Rights**, such that access is maintained and in sync across systems.

Note:

- Changes to **Personnel** data in POS enrollment are reflected in ANGIE Manage Staff.
- Changes to **Demographic**, **Title** and **Supervisor** made in ANGIE are reflected in POS enrollment.
- There will be a 15 minute delay on updates between POS and ANGIE.



21. Business Administrator: Task Assignment Based on New Specialized Skillsets for Error Correction, Coming Due, **S15** and **S61.**

New skillsets and task assignment logic will be added in ANGIE R2:

- Error Correction

- Coming Due Tasks Only
- **S15**
- **S61**

These new skillsets will be available to the business administrator and authorized managers in the **Manage Staff** page.

Error Correction Skillset
Staff with the skillset of **Error Correction** will receive **Error Correction** tasks first via **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets. The following updates will take place:

- Manual assignments and activities on hold will continue to be assigned first.
- When **Get Next Case for Processing** is clicked and there are no manual assignments or tasks on hold for the Worker, the next highest priority **Error Correction** task is assigned.
- When **Get Next Case for Sign-Off** is clicked and there are no tasks on hold for the supervisor, the next highest priority **Error Correction** approval is assigned.

Coming Due Tasks Only Skillset
Staff with the skillset of **Coming Due Tasks Only** will only receive tasks that are not past the task due date via the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets. This will provide FIA SNAP and MMAP with additional flexibility in their ANGIE assignments.

S15 Skillset
Staff with the skillset of **S15** will first received tasks for cases with Center **F15** in WMS via the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets.

S61 Skillset
Staff with the skillset of **S61** will first received tasks for cases with center **F61** in WMS via the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets.

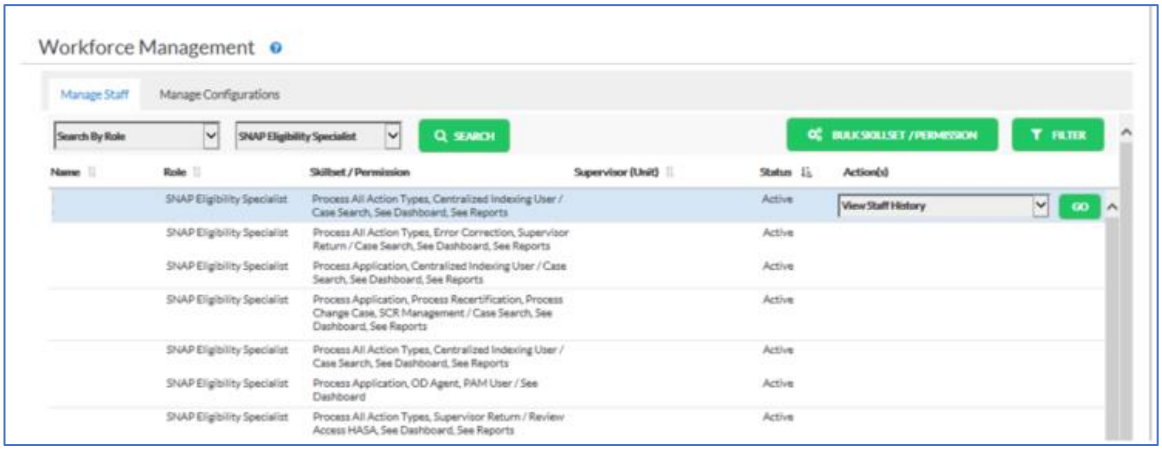
Combinations of Skillsets
The skillsets will work together with the associated **Process** skillsets selected for the staff:

- Example 1: If the worker only processes Applications and has a skillset of **Error Correction**, they will only get **Application Error** correction and Expedited Supplemental Nutrition Assistance Program (ESNAP) Error correction through the **Get Next Case for Processing** widget.
- Example 2: If the supervisor only processes Recertifications and has a skillset of **Error Correction** selected, they will first be assigned **Recertification Error Correction** approvals through Get Next Case for Sign-Off widget.

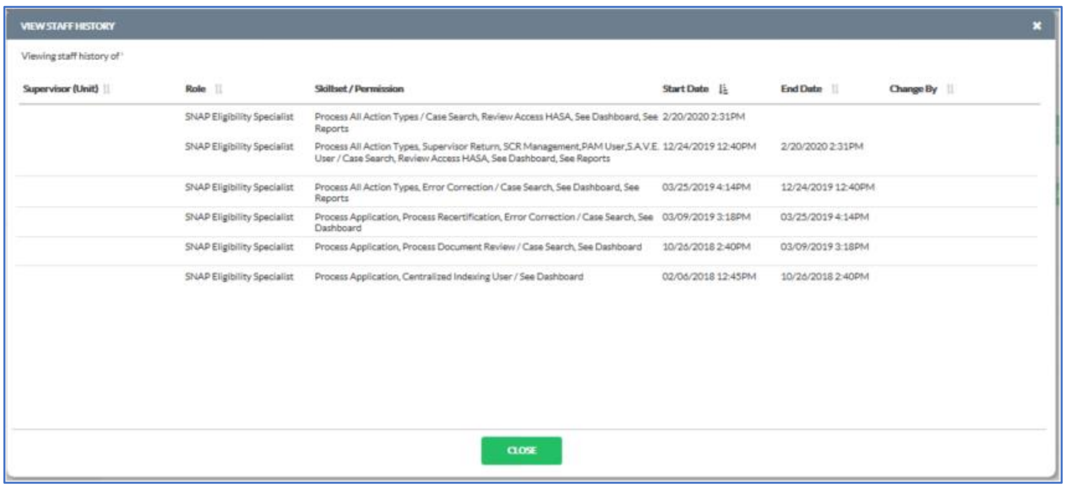
- Example 3: If the worker only processes Applications, has a skillset of **S15** and a skillset of **Error Correction**, they will be assigned **Application Error Correction** tasks from **S15** through **Get Next Case for Sign-Off** widget.

22. Business Administrator: View Staff History

To view the Staff history, the Business Administrator must select the row from the **Manage Staff** grid and then select the option **View Staff History** from the **Action(s)** dropdown as seen below. The selected row will be highlighted within the grid.

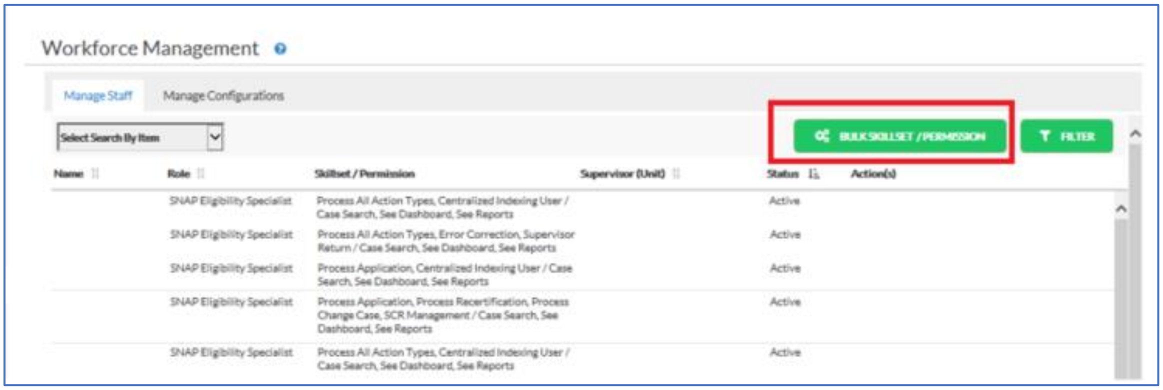


Selecting **View Staff History** within **Action(s)** and then the **Go** button will result in the modal window displaying the complete staff history of the respective Staff as seen below. The information displayed includes **Supervisor (Unit)**, **Role**, **Skillset/Permission**, **Start Date**, **End Date**, and Change By.



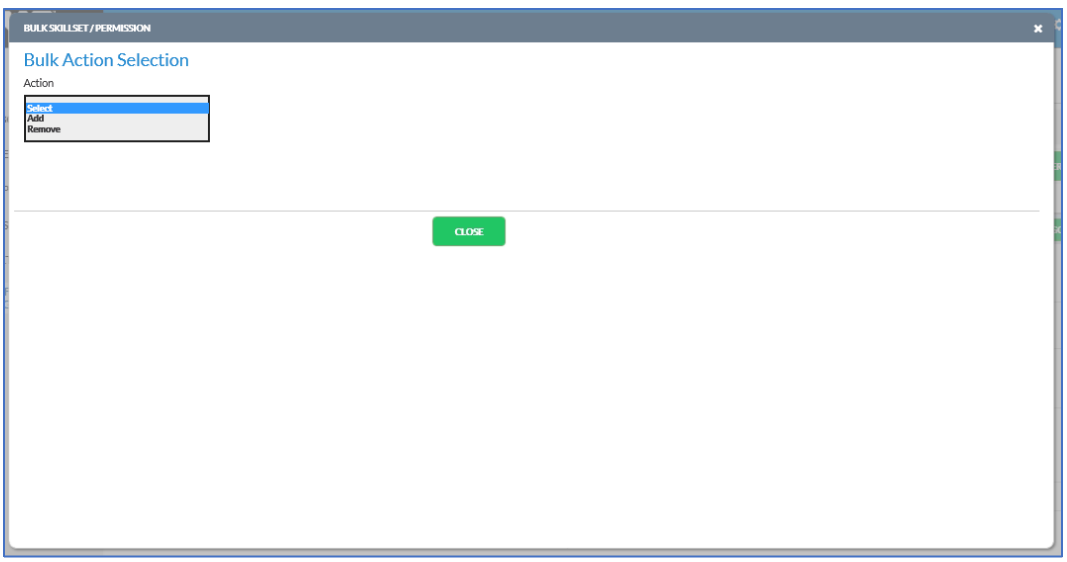
23. Business Administrator: Bulk Skillset/Permission

The Business Administrator has the capability to simultaneously **Add** or **Remove** a **Skillset** or **Permission** in bulk to multiple Eligibility Specialists, Supervisors, Managers, or Regional Managers when selecting the **Bulk Skillset / Permission** button found in the **Manage Staff** tab of **Workforce Management** page.

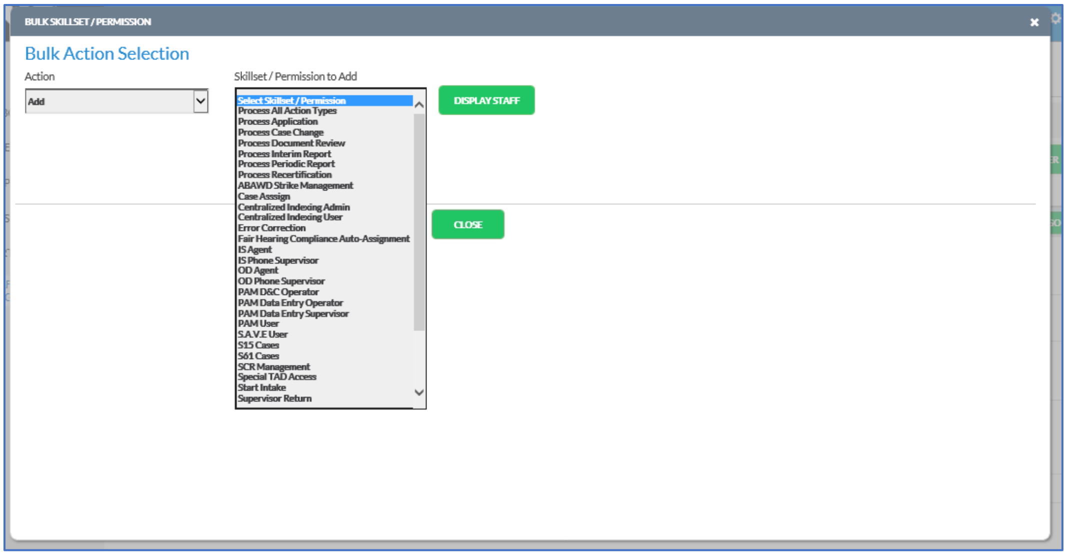


Add-Bulk Skillset / Permission

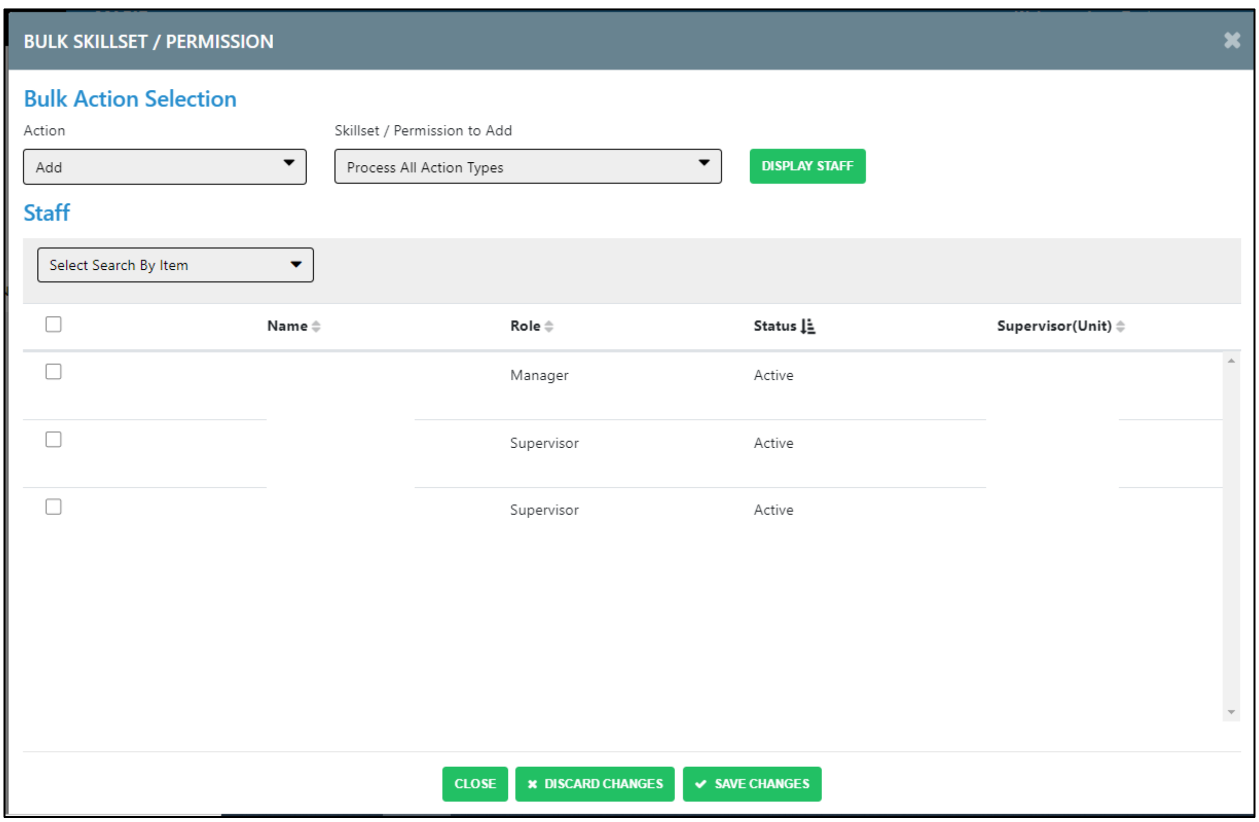
- Clicking the **Bulk Skillset/Permission** button from the **Manage Staff** page will display the modal window as seen below.



The Business Administrator must select from the **Action** dropdown consisting of **Add** and **Remove. Add** is selected in the screen below. Consequently, **Skillset/Permission to Add** dropdown is displayed. The Business Administrator must select an option from **Skillset / Permission** dropdown to **Add**.



- After selecting an option from the **Skillset / Permission to Add** dropdown, selecting the **Display Staff** button will result in the display of the **Staff** section as seen below. The sortable columns displayed within the Staff section include **Name**, **Role**, **Status** and **Supervisor (Unit)**.

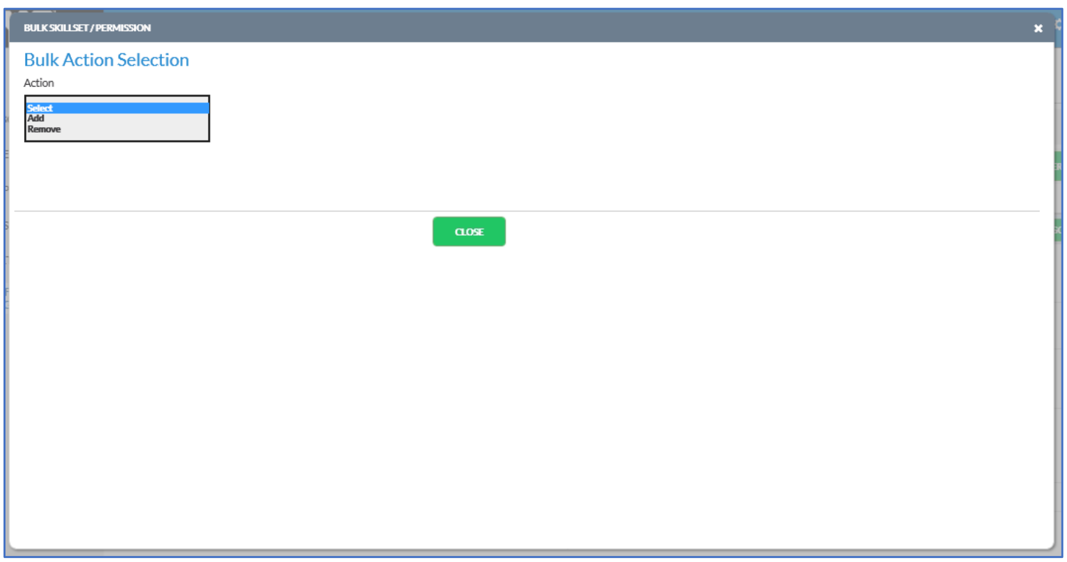


Within the Staff section, the Business Administrator can further refine the search results **By Staff Name** or **By Role:**

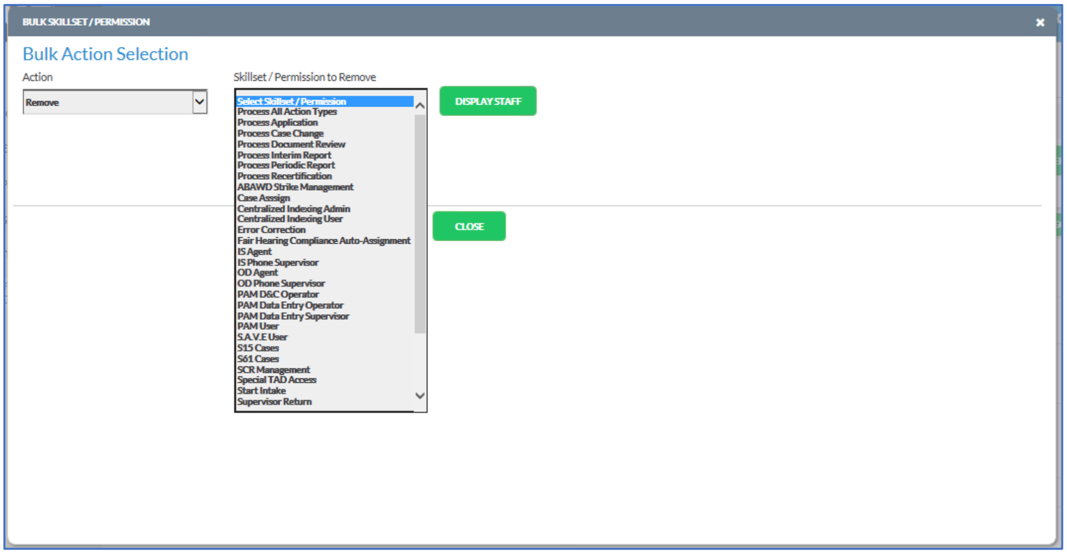
- Selecting **Search By Staff Name** will display a name field requiring the Business Administrator to enter the Name of the desired Staff. Selecting the Search button will display the corresponding results.
- Selecting **Search By Role** will display a dropdown requiring the Business Administrator to select the Role consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, **Clerical** and **Associate.** Selecting the Search button will display the corresponding results as seen below.
- The new **Supervisor (Unit)** column and search option allow the Business Administrator to search for all Workers reporting to a specific Supervisor. This will allow the Administrator to update an entire group's skillsets and permissions, rather than a single Worker at a time.
- Selecting the **Checkbox** at the Name column header will display all search results. The Business Administrator can select multiple rows. Selecting **Save Changes** will **Add** the selected **Skillset** or **Permission** for the chosen Eligibility Specialists, Supervisors, Managers, or Regional Managers.

Business Admin: Remove-Bulk Skillset / Permission

- Clicking the **Bulk Skillset/Permission** button from the **Manage Staff** page will display the modal window as seen below.



The Business Administrator must select an option from **Skillset / Permission** dropdown to **Remove**.



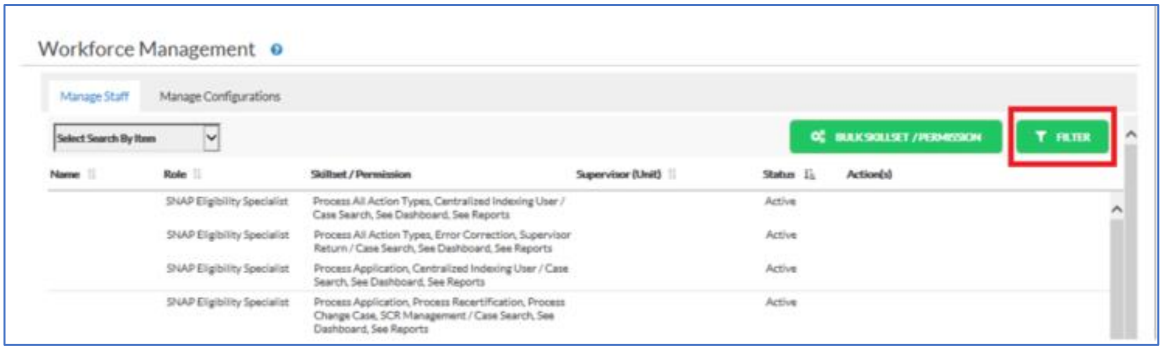
After selecting an option from the **Skillset / Permission to Remove** dropdown, select the **Display Staff** button which will result in the display of the **Staff** section as seen below. The sortable columns displayed within the Staff section include **Name**, **Role** and **Status**.

Within the Staff section, the Business Adminstrator can further refine the search results **By Staff Name** or **By Role:**

- Selecting **Search By Staff Name** will display a name field requiring the Business Administrator to enter the Name of the desired Staff. Selecting the **Search** button will display the corresponding results.
- Selecting **Search By Role** will display a dropdown requiring the Business Administrator to select the Role consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, **Clerical** and **Associate.** Selecting the **Search** button will display the corresponding results as seen below.
- The new **Supervisor (Unit)** column and search option allow the Business Administrator to search for all Workers reporting to a specific Supervisor. This will allow the Administrator to update an entire group's skillsets and permissions, rather than a single Worker at a time.
- Selecting the checkbox at the **Name** column header will display all search results. The Business Administrator can select multiple rows. Selecting **Save Changes** will **Remove** the selected **Skillset or Permission** for the selected Eligibility Specialists, Supervisors, Managers, or Regional Managers.

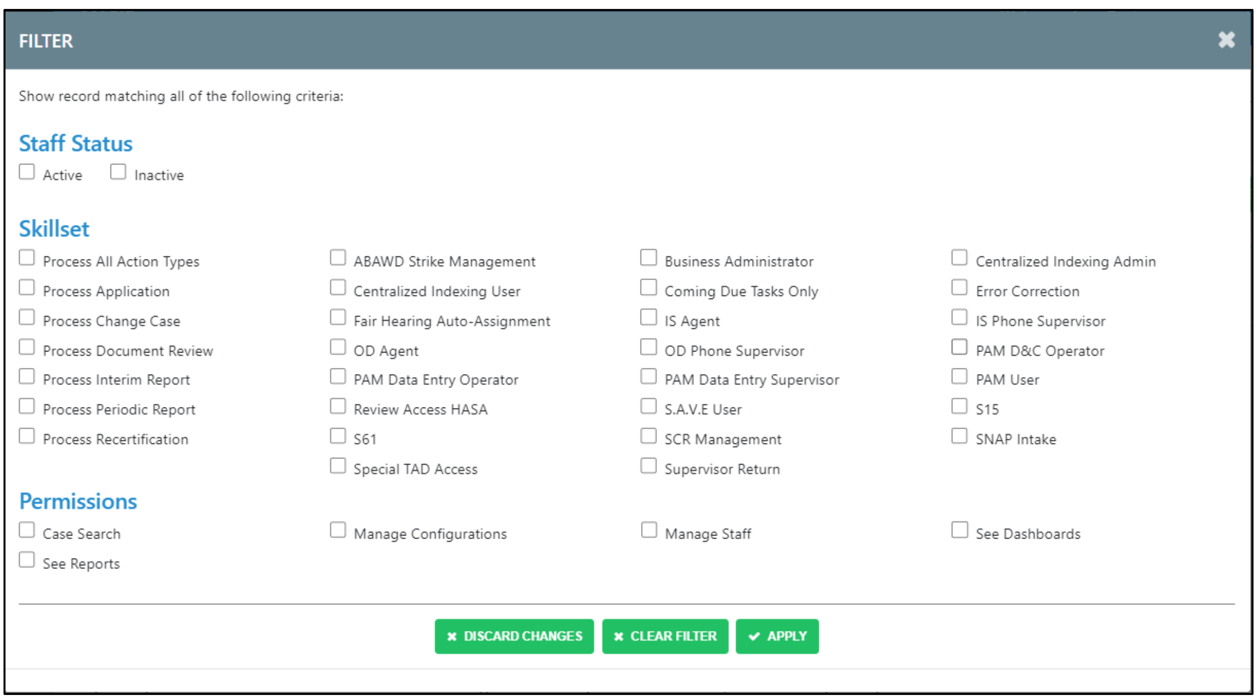
24. Business Administrator: Filter

The **Filter** button is displayed on the **Manage Staff** tab of Workforce Management page as seen below.



The **Filter Modal Window** is displayed when the **Filter** button is clicked as seen below. This screen will allow the Business Administrator to further refine the search results by **Staff Status**, **Staff Skillset**, or by **Staff Permission**. This Filter modal window consists of **Staff Status**, **Staff Skillset**, and **Staff Permission** sections.

The Business Administrator can select any of the checkboxes displayed on the screen. Selecting the **Apply** button will apply the filtered criteria to the search results grid on the **Manage Staff** page.

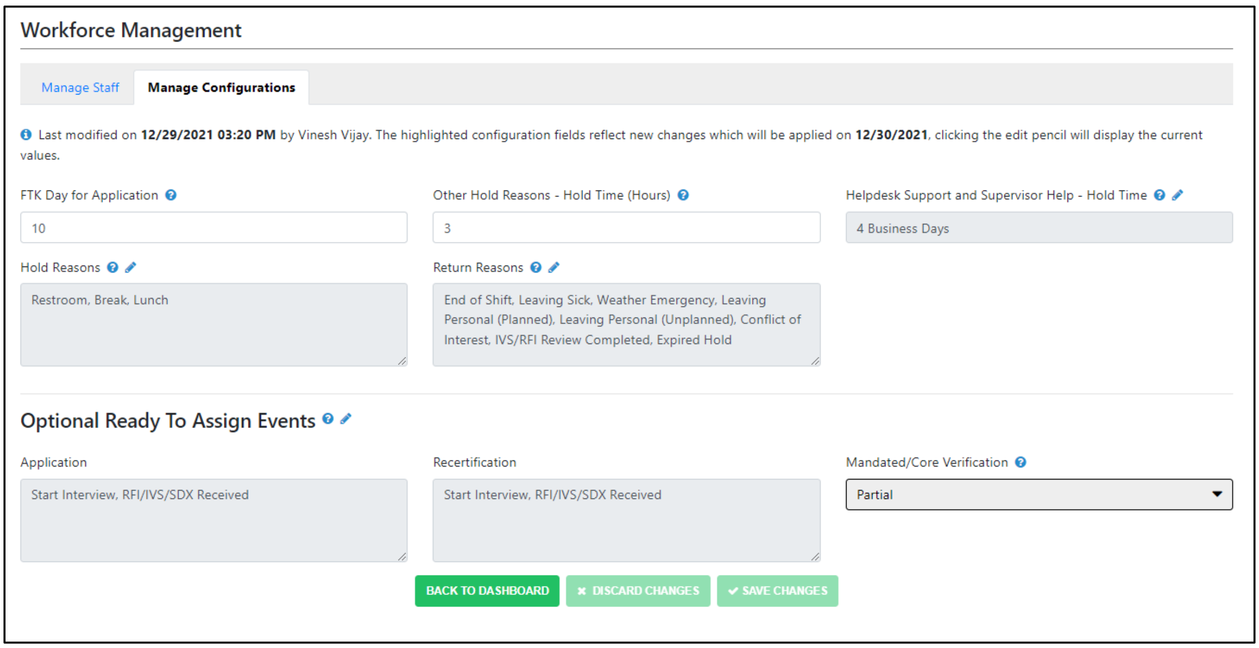


25. Business Administrator: Manage Configurations

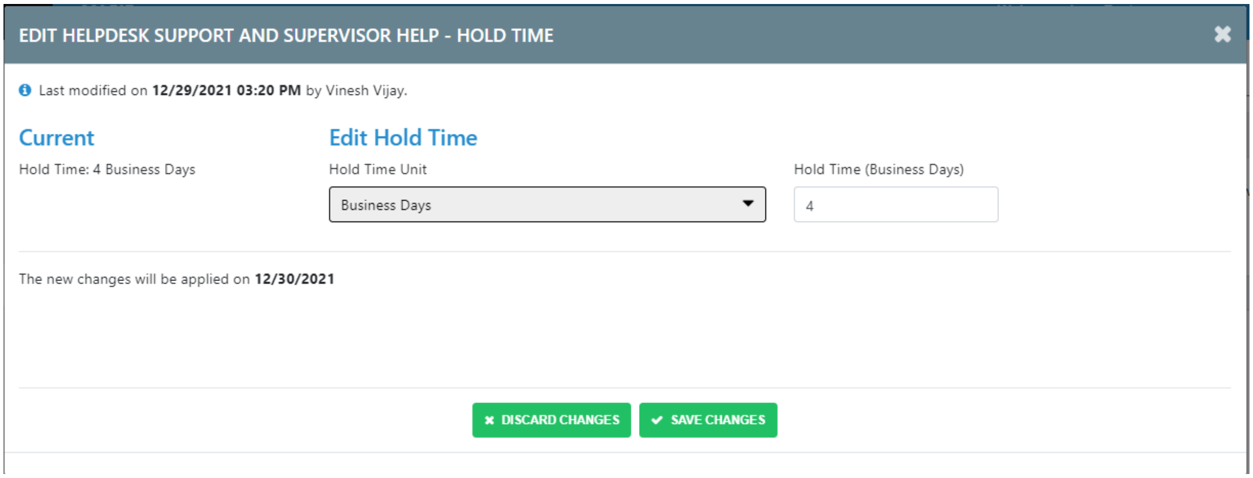
This interface allows changes to configuration menus and values. Access is controlled through the skillset of **Manage Configurations.** This skillset provides access to the **Workforce Management Interface** using the navigation bar in ANGIE. Any changes made within the Manage Configurations tab take effect the next day.

The Business Administrator can update the fields for **FTK Day for Application** and **Hold Time (hours)** on this screen directly:

- **Fail to Keep (FTK) Day for Application** refers to the number of days when a client must begin the interview or else the case will be marked as FTK.
- **Other Hold Reasons – Hold Time (hours)** refers the number of hours a piece of work can be put on hold for hold reasons other than **Help Desk Support** and **Supervisor Help**. Once the hold time is reached for a particular work, it will be sent back to the prioritized list.
- **Helpdesk Support and Supervisor Help – Hold Time** allows the Regional Manager to update the hold time(s) for the **Helpdesk Support** and **Supervisor Help** hold reasons.

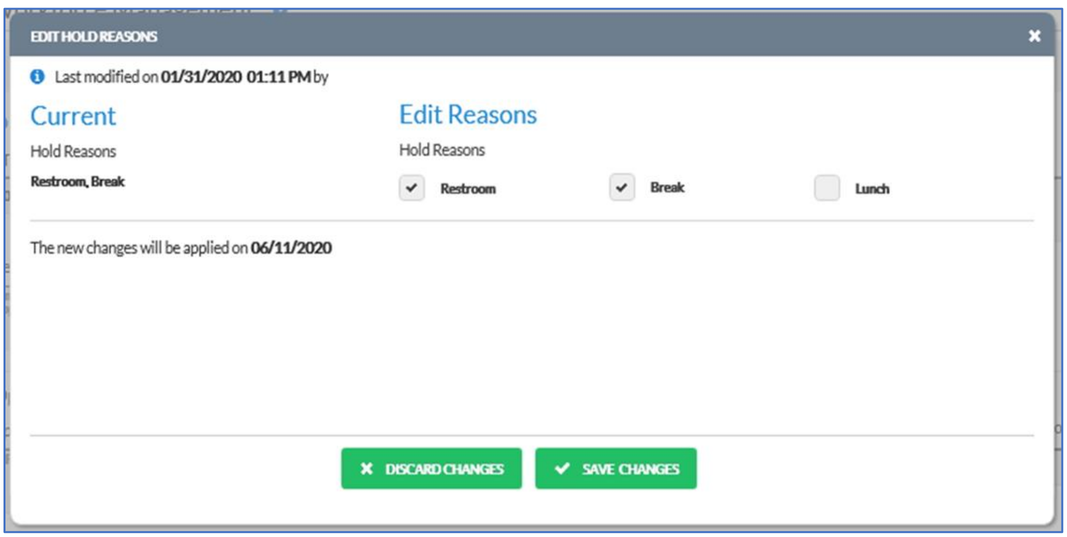


- Selecting the Pencil icon for **Helpdesk Support and Supervisor Help – Hold Time** opens a new modal window. The Regional Manager must select the **Hold Time Unit** (Business Days or Hours) and enter the **Hold Time** in business days or hours, based on their selection.

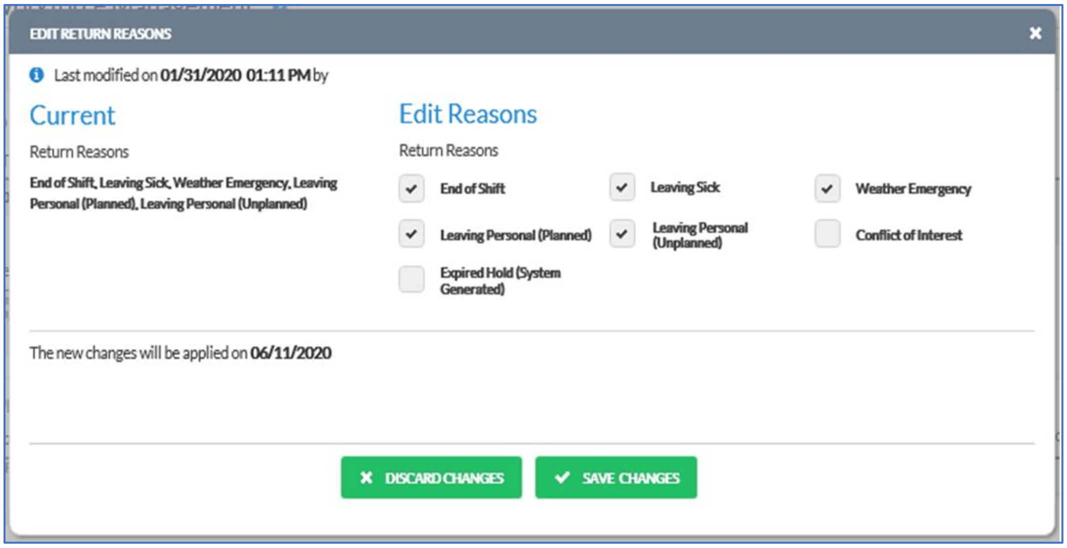


- Selecting the **Pencil** icon for **Hold reasons**, **Return Reasons**, and **Optional Ready to Assign Events** will result in the corresponding modal windows.

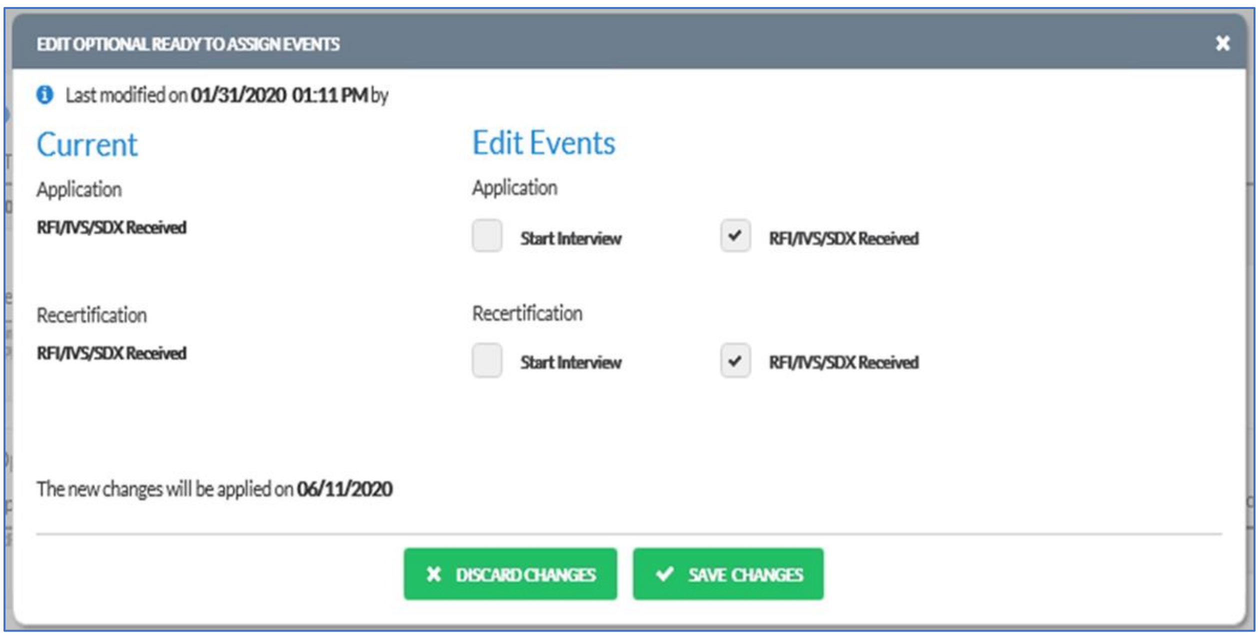
- Selecting the **Hold Reasons Pencil icon** (above screen) will display the modal window showing the Currently established Hold Reasons in ANGIE as seen below. The **Edit Reasons** section of below modal window shows the available **Hold** options that the Business Administrator can choose from. The selections made can be saved by selecting the **Save Changes** button.



- Selecting the **Return Reasons edit icon** will display the modal window showing the Currently established **Return Reasons** in ANGIE. The **Edit Reasons** section of below modal window shows the available **Return** options that the Business Administrator can choose from. The selections made can be saved by selecting the **Save Changes** button.



- Selecting the **Optional Ready To Assign Events** icon will display the modal window for the currently established **Ready To Assign Events for Application and Recertification** in ANGIE. The **Edit Events** section of below modal window shows the available **Ready To Assign Events for Application and Recertification** that the Business Administrator can choose from. The selections made can be saved by selecting the **Save Changes** button.



The **Mandated/Core Verification** is a dropdown on the main **Manage Configurations** page that allows the Business Administrator to choose between **Full** or **Partial:**

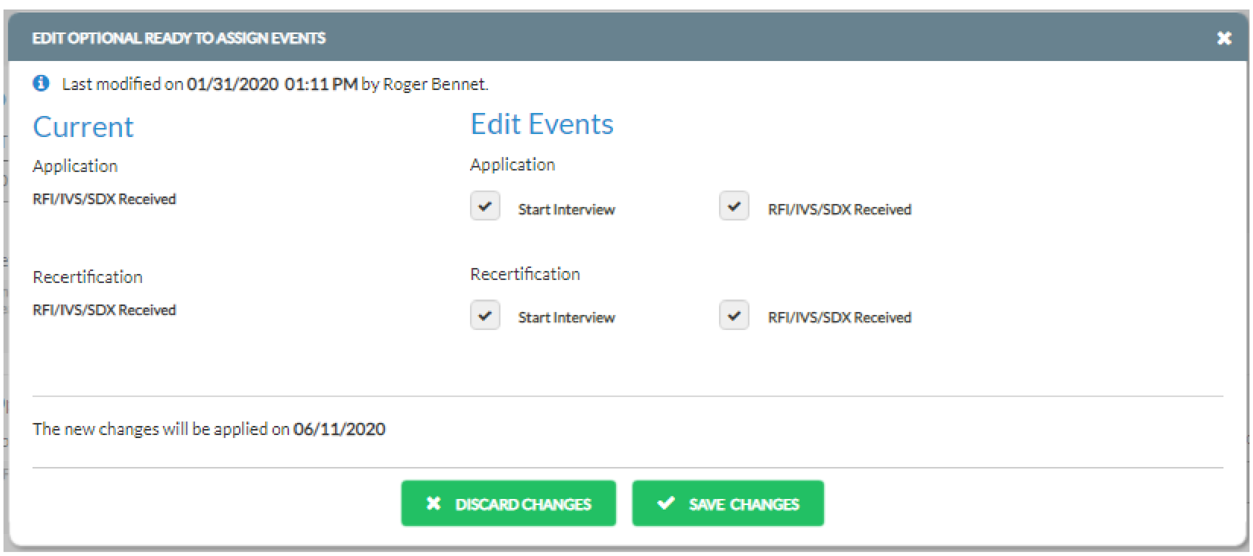
  - If **Full** is selected, then all mandated documents must be submitted before the task is **Ready to Assign**.
  - If **Partial** is selected, then some but not all mandated docs are submitted before the task is **Ready to Assign**.

- To apply the changes, the Business Administrator must select the **Save Changes** button of the main **Manage Configurations** page. Any changes made within the Manage Configurations tab will not take into effect until next day.

26. Business Administrator: Manage Configurations and Assignment of Interviews in Emergency Situations

ANGIE will be updated to allow assignment of interviews for emergency situations. These assignments will be controlled through the **Manage Configuration Interface** by authorized managers through the **Edit Optional Ready to Assign Events** window. The authorized manager will click on the **Start Interview** checkbox to enable these assignments for application and recertification interviews

When this parameter is set, ANGIE will assign interviews via the **Get Next Case for Processing** widget for workers who indicate that they will be doing interviews in the **Work Assignment** screen at the time that they log into ANGIE.



Interviews will be assigned based on the application date for application interviews and the recertification date for recertification interviews. For recertifications, the interviews will only be assigned if the Supplemental Assistance Program (SNAP) Application (**LDSS-4826**) form, Application/Certification for Supplemental Nutrition

Assistance Program (SNAP) Benefits (**LDSS-5166**) form or the Access Human Services Administration (AHRA) recertification was submitted.

Attachment F

Reports

ANGIE Release 2 Notes

Table of Contents

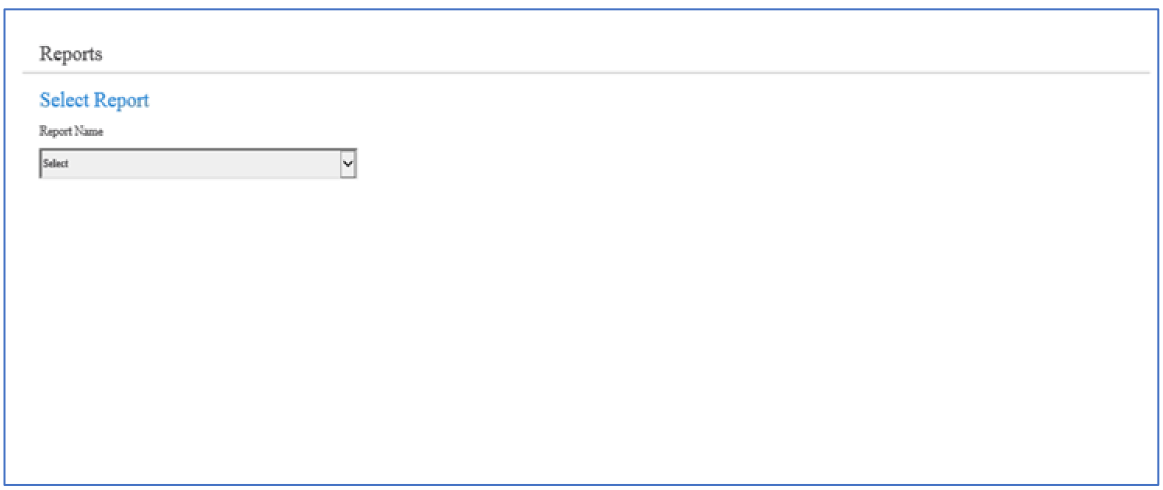
1. Document Objective

The objective of this document is to provide details on the reports available within the Activity and General Information Exchange (ANGIE), including updates to existing reports and new reports added in Release 2 (R2).

2. Reports

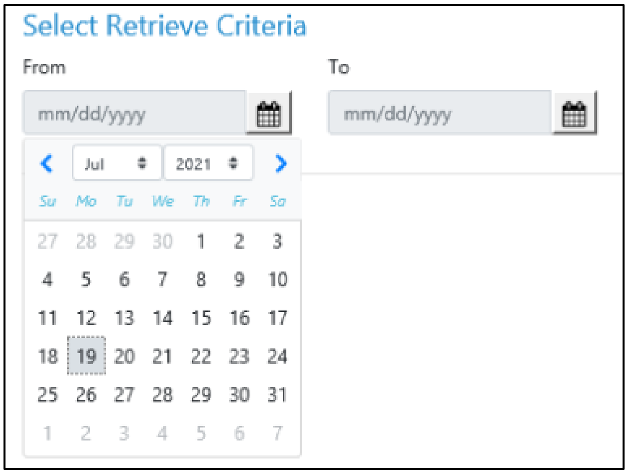
The Manager and Regional Manager possessing the skillset of **See Reports** will have access to the **Reports** page and can generate the following reports:

- **Daily Activity**
- **Deferrals**
- **Staff Overview**
- **Timings**
- **Work Outstanding**
- Performance Management – Supervisor Returns
- Performance Management – Welfare Management System (WMS) Errors
- Performance Management – Deferrals
- WMS Transmissions
- Selective Case Review Summary
- Selective Case Review Details



3. Updated Report Calendar Control

The **Calendar** widget in the reports will be updated to display the weeks as Sunday through Saturday.

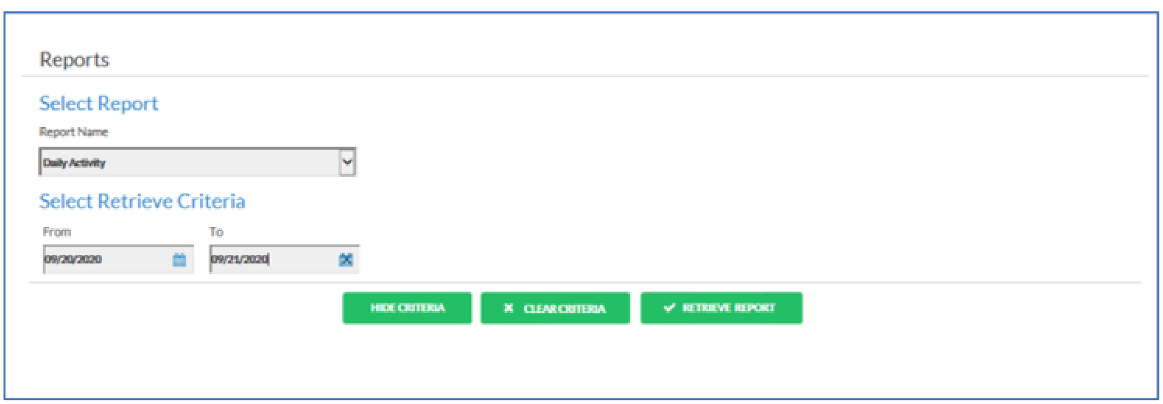


4. Daily Activity Report

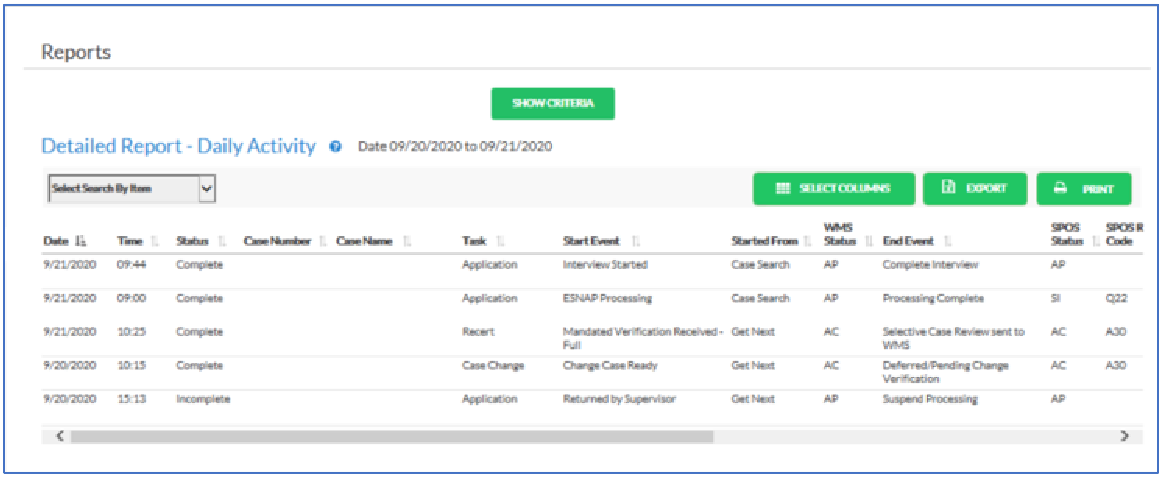
The Regional Manager can generate the **Daily Activity** report from the **Reports** page of ANGIE. This report provides information to the Regional Manager on the **Daily Activity** snapshots (as of midnight that day) for the selected date range, allowing the management to review progress made by the selected staff.

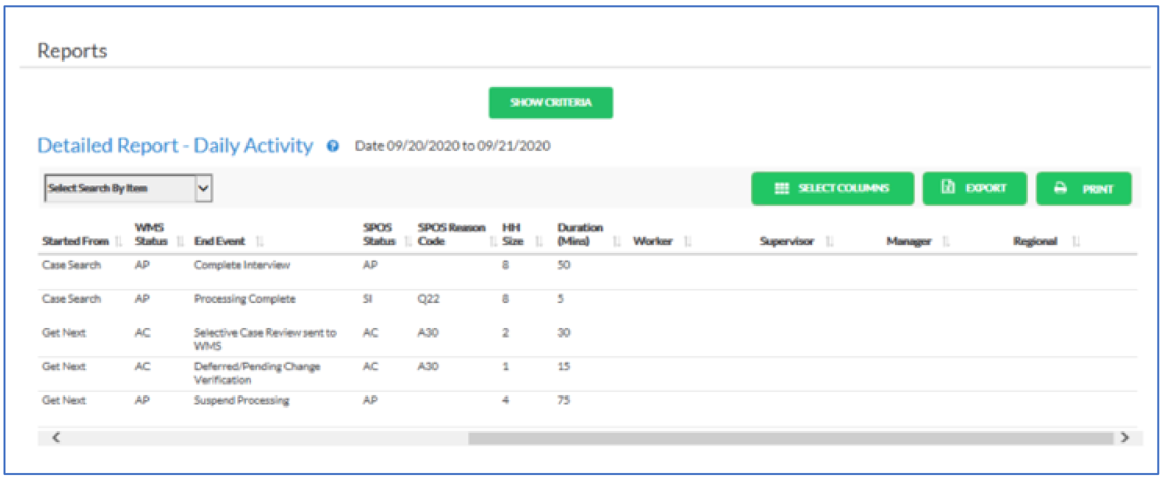
In R2, the **Daily Activity Report** will be updated to include **Periodic Report** and **Interim Report** data so that management can review the progress made by the staff as required.

After selecting **Daily Activity** from the report dropdown, the Regional Manager will see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range as seen below.



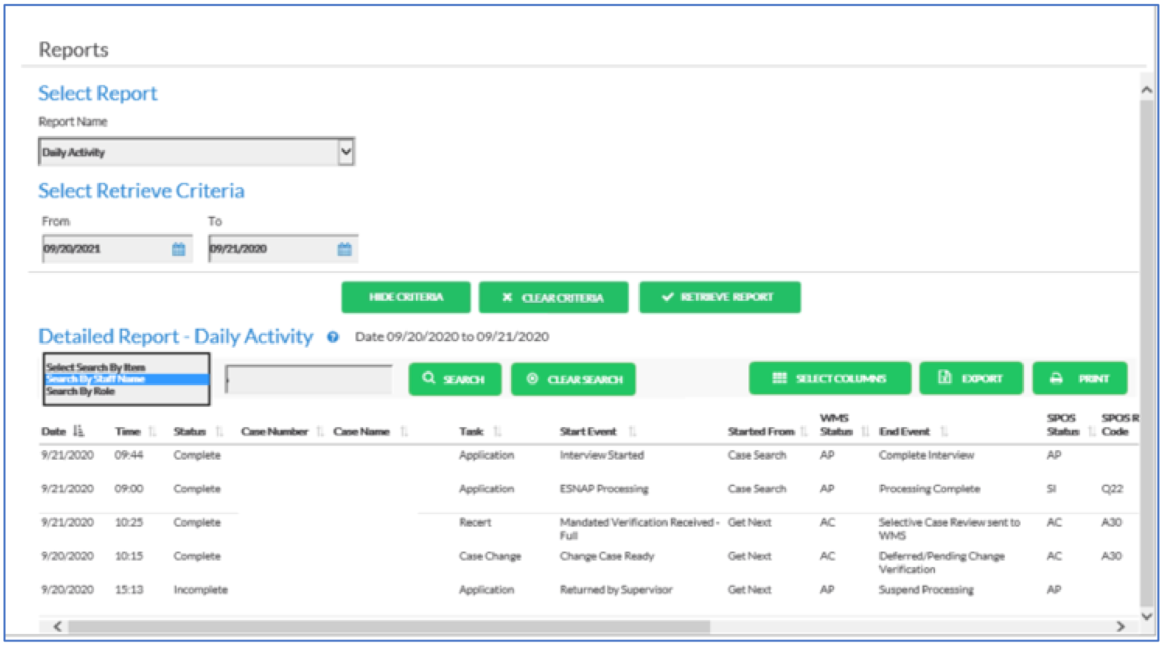
- Selecting the **Retrieve Report** button will display the **Detailed Report – Daily Activity** section. The report will be displayed within the **Detailed Report - Daily Activity** section of the page. The default view of this report will hide the Search Criteria as seen below.





Selecting the **Show Criteria** button will display the **Selected Retrieve Criteria** as seen below:

- The Regional Manager can further search **By Staff Name** or **By Role** (SNAP **Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, **Clerical Associate**).
- Columns consist of **Date**, **Time**, **Status**, **Case Number**, **Task**, **Start Event**, **Started From**, **WMS Status**, **End Event**, **SPOS Status**, **SPOS Reason Code**, **HH Size**, **Duration (Mins), Worker**, **Supervisor, Manager**, and **Regional**.
- The Horizontal scroll bar allows the Regional Manager to scroll horizontally.



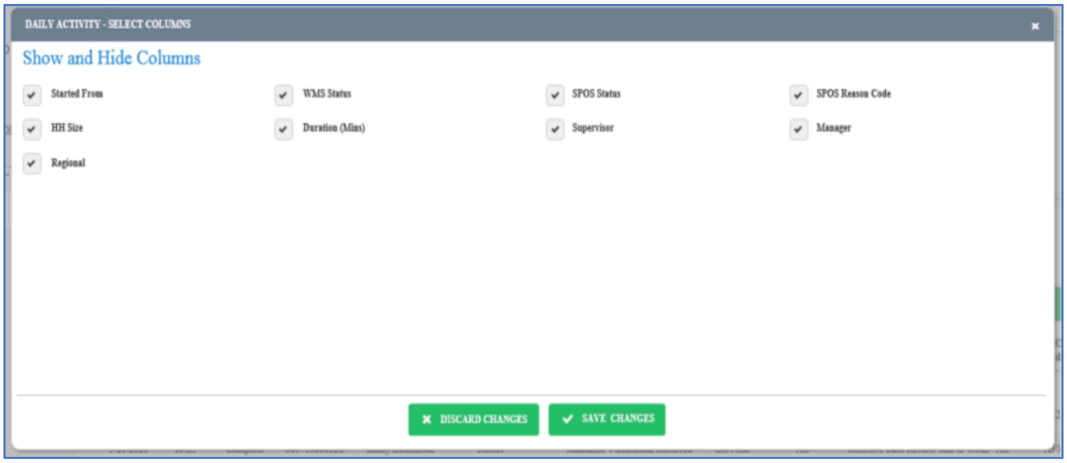
The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

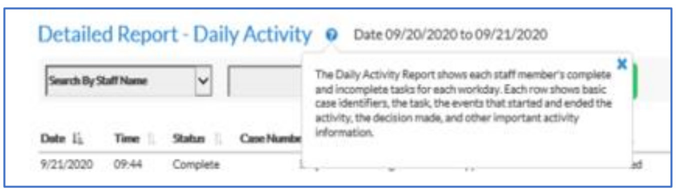
The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- **Selecting Print** generates an Excel file with the on-screen report output. Selected columns will appear in the printed output.
- The **Export** option allows export to Excel.

Upon clicking the **Select Columns** button, the Regional Manager will see a modal window to choose the desired columns for the report. **Save changes** will apply only to the selected columns of the report.



Help Text displayed for Daily Activity report within the **Detailed Report** section:

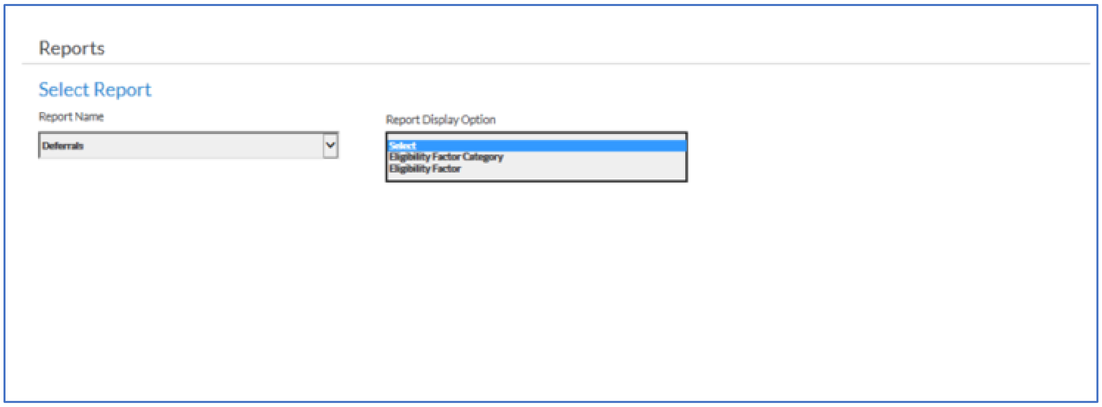


5. Deferrals Report

The Regional Manager can generate the **Deferrals** report from the **Reports** page of ANGIE. This report will display all deferrals initiated for Applications and Recertifications broken down by the **Eligibility Factor** and the **Eligibility Factor Category** for a given date range.

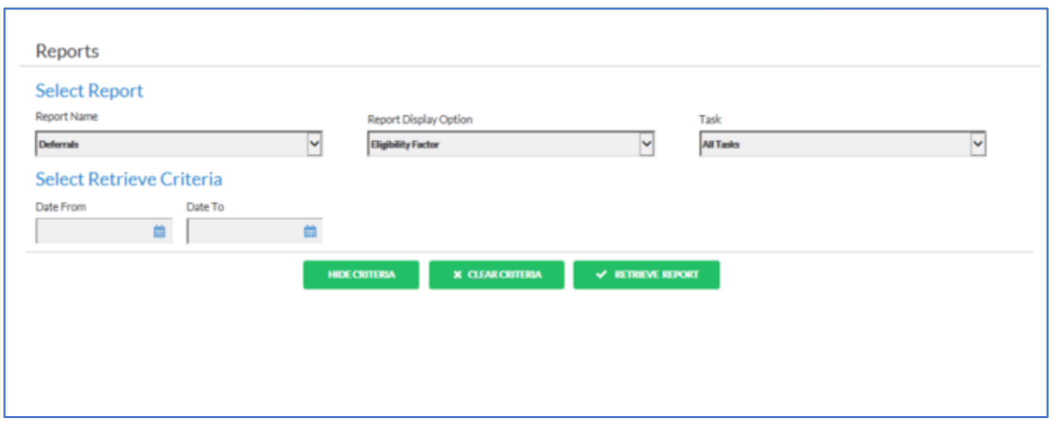
In R2, the **Deferrals Report** will be updated to include **Case Changes**, **Periodic Reports,** and **Interim Reports**. The data displayed for this report originates from the generated Notice of Documentation Required – Change in Household Circumstances (**W-132S**).

<u>Deferrals Report – Eligibility Factor</u>
Upon selection of the **Deferrals** option from the **Report Name** dropdown, the Regional Manager will see the **Report Display Option** dropdown consisting of **Eligibility Factor Category** and **Eligibility Factor**.



After **Eligibility Factor** is selected, the Regional Manager will see the **Task** dropdown consisting of **All Tasks**, **Applications**, **Recertifications**, **Case Changes**, **Periodic Reports**, and **Interim Reports**.

All Tasks is selected in below screen.

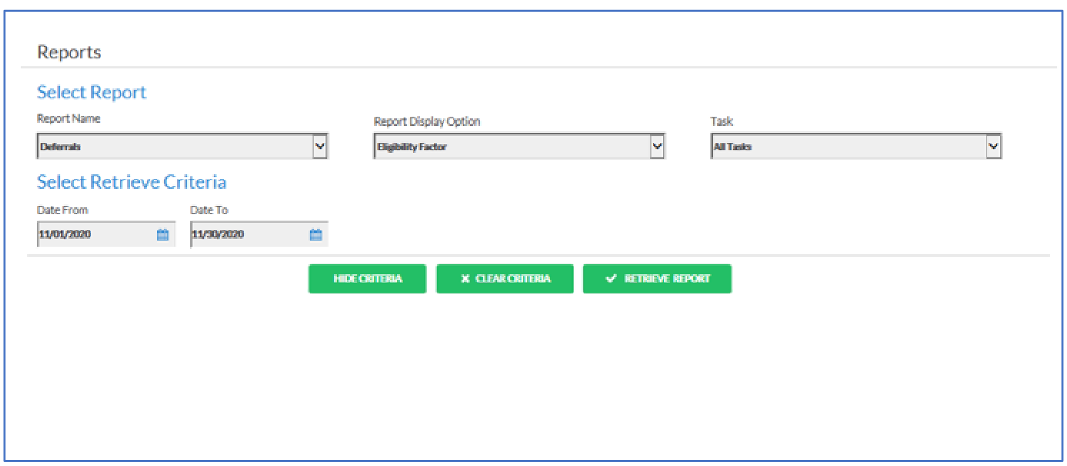


- When the **Task** filter is set as **Applications**, the Regional Manager must have an additional filter of **File Date** that allows them to set the date range of Supplemental Nutrition Assistance Program (SNAP) file dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Regional Manager must have an additional filter of **Interview Date** that allows them to set the date range of the interview month for the report output. **Note:** A full month date range must be selected (beginning of a month and end of a month), as the Recertification data is based on the **Interview Month** cohort and NOT the actual month the applicant/participant conducted their Recertification interview. **Note:** The **Interview Date** is based on the **Original Appointment Date**.
- When the Task filter is set to **Case Changes**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Change Submission Date From** and **Change Submission Date To** fields as seen below.

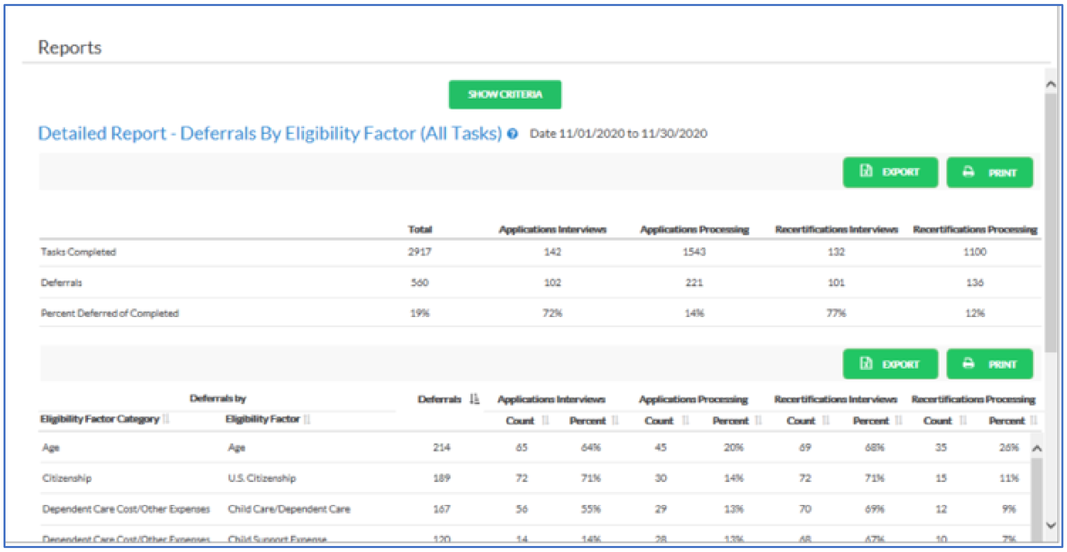
Selecting the Retrieve Report button will generate the report based on the entries made.

- When the **Task** filter is set to **Periodic Reports**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Periodic Report Month From** and **Periodic Report Month To** fields as seen below. Selecting the Retrieve Report button will generate the report based on the entries made.
- When the **Task** filter is set to **Interim Reports**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Interim Report Month From** and **Interim Report Month To** fields as seen below. Selecting the **Retrieve Report** button will generate the report based on the entries made.
- When the Task filter is set to **All Tasks**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Month From** and **Month To** fields as seen below. This will allow the Manager to set the month and year date range that will be applied to all the tasks which includes **Applications** tasks as SNAP File Date, **Recertifications** as **Interview Month**, **Case Changes** as **Change Submission Date**, **Periodic Reports** as **Periodic Report Due Month**, and **Interim Report** tasks as **Interim Report Due Month** for the report output.

The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the appropriate date range as seen below.



- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria.



Reports

SHOW CRITERIA

Detailed Report - Deferrals By Eligibility Factor (All Tasks) Date 11/01/2020 to 11/30/2020

EXPORT PRINT

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	560	102	221	101	136
Percent Deferred of Completed	19%	72%	14%	77%	12%

EXPORT PRINT

Deferrals by		Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
Eligibility Factor Category	Eligibility Factor		Count	Percent	Count	Percent	Count	Percent	Count	Percent
Age	Age	214	65	64%	45	20%	69	68%	35	26%
Citizenship	U.S. Citizenship	189	72	71%	30	14%	72	71%	15	11%
Dependent Care Cost/Other Expenses	Child Care/Dependent Care	167	56	55%	29	13%	70	69%	12	9%
Dependent Care Cost/Other Expenses	Child Support Expense	120	14	14%	28	13%	68	67%	10	7%

- Click the **Show Criteria** button to display the selected criteria as seen below.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

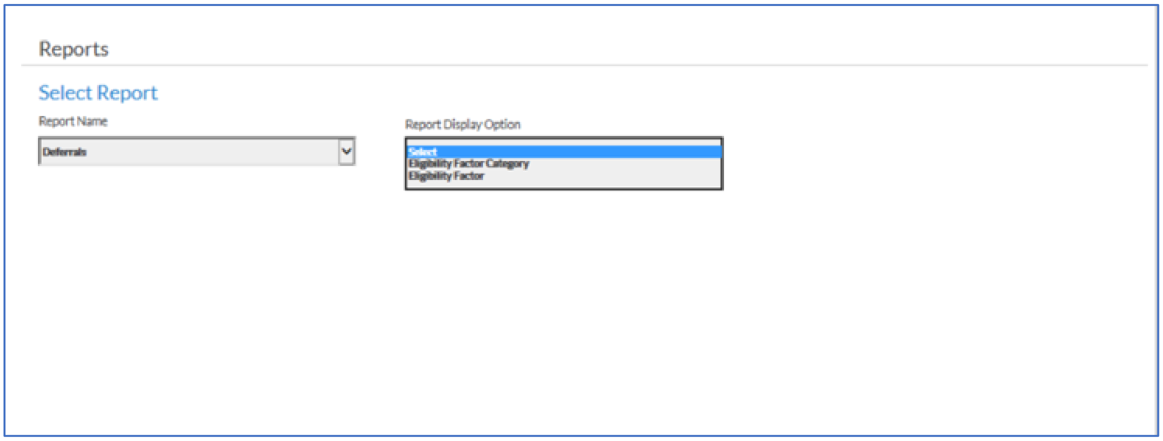
- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to print and export the data.

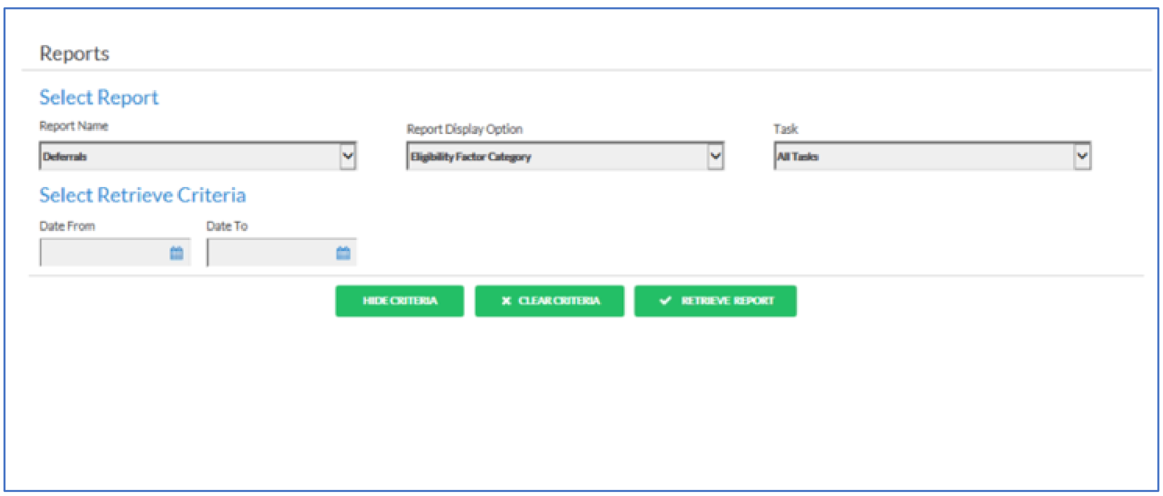
- Selecting **Print** generates an Excel file with the on-screen report output. Selected columns will appear in the printed output.
- The **Export** option allows export to Excel.

<u>Deferrals Report – Eligibility Factor Category</u>

Upon selection of the **Deferrals** option from the **Report Name** dropdown, the Regional Manager will see the **Report Display Option** dropdown consisting of **Eligibility Factor Category** and **Eligibility Factor**.



After the **Eligibility Factor Category** is selected, the Regional Manager will see the **Task** dropdown consisting of **All Tasks**, **Applications**, **Recertifications**, **Case Changes**, **Periodic Reports**, and **Interim Reports**. **All Tasks** is selected in below screen.



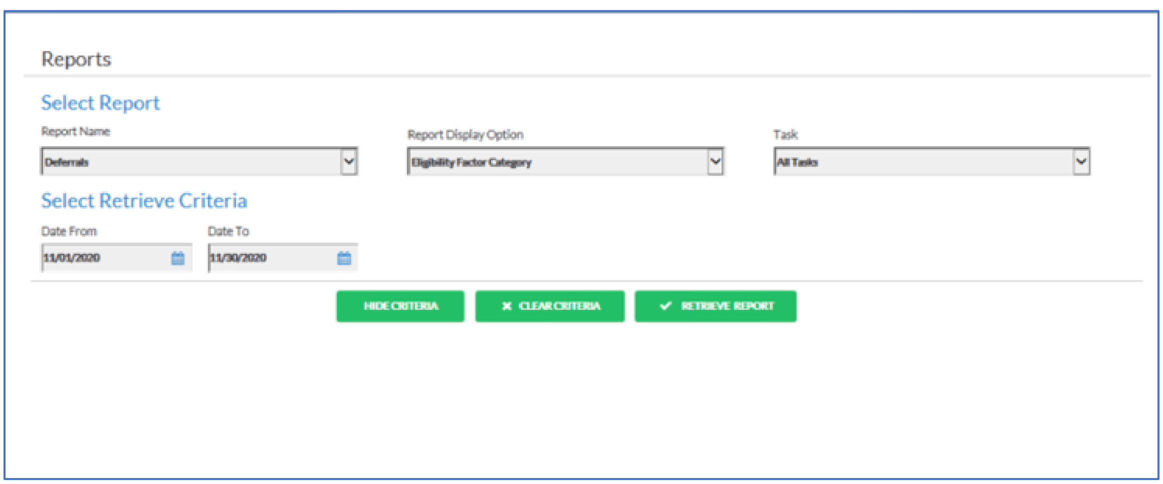
Note:

- When the Task filter is set as **Applications**, the Regional Manager must have an additional filter of **File Date** that allows them to set the date range of **SNAP File Dates** for the report output.
- When the Task filter is set as **Recertifications**, the Regional Manager must have an additional filter of **Interview Date** that allows them to set the date range of the interview month for the report output. **Note:** A full month date range must be selected (beginning of a month and end of a month), as the Recertification data is based on the **Interview Month** cohort and NOT the actual month the applicant/participant conducted their Recertification interview. **Note:** The **Interview Date** is based on the **Original Appointment Date**.
- When the Task filter is set to **Case Changes**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Change Submission**

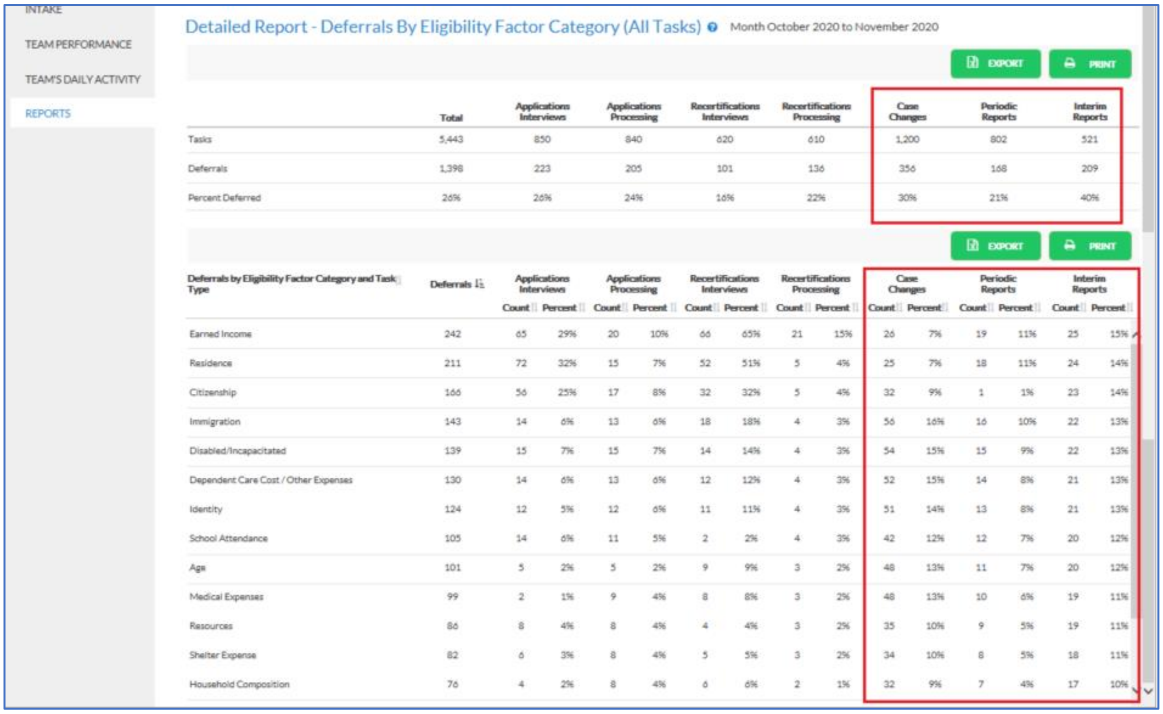
Date From and **Change Submission Date To** fields as seen below. Selecting the **Retrieve Report** button will generate the report based on the entries made.

- When the Task filter is set to **Periodic Reports**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Periodic Report Month From** and **Periodic Report Month To** fields as seen below. Selecting the **Retrieve Report** button will generate the report based on the entries made.
- When the Task filter is set to **Interim Reports**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Interim Report Month From** and **Interim Report Month To** fields as seen below. Selecting the **Retrieve Report** button will generate the report based on the entries made.
- When the Task filter is set to **All Tasks**, the Manager will be displayed with the **Select Retrieve Criteria** section consisting of **Month From** and **Month To** fields as seen below. This will allow the Manager to set the month and year date range that will be applied to all the tasks which includes **Applications** tasks as SNAP File Date, **Recertifications** as Interview Month, **Case Changes** as **Change Submission Date**, **Periodic Reports** as **Periodic Report Due Month**, and **Interim Report** tasks as **Interim Report Due Month** for the report output.

The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the appropriate date range as seen below.



- Click the **Retrieve Report** button to display the **Detailed Report** section. The report is displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria.



	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing	Case Changes	Periodic Reports	Interim Reports
Tasks	5,443	850	840	620	610	1,200	802	521
Deferrals	1,398	223	205	101	136	356	168	209
Percent Deferred	26%	26%	24%	16%	22%	30%	21%	40%

Deferrals by Eligibility Factor Category and Task Type	Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing		Case Changes		Periodic Reports		Interim Reports	
		Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Earned Income	242	65	29%	20	10%	66	65%	21	15%	26	7%	19	11%	25	15%
Residence	211	72	32%	15	7%	52	51%	5	4%	25	7%	18	11%	24	14%
Citizenship	166	56	25%	17	8%	32	32%	5	4%	32	9%	1	1%	23	14%
Immigration	143	14	6%	13	6%	18	18%	4	3%	56	16%	16	10%	22	13%
Disabled/Incapacitated	139	15	7%	15	7%	14	14%	4	3%	54	15%	15	9%	22	13%
Dependent Care Cost / Other Expenses	130	14	6%	13	6%	12	12%	4	3%	52	15%	14	8%	21	13%
Identity	124	12	5%	12	6%	11	11%	4	3%	51	14%	13	8%	21	13%
School Attendance	105	14	6%	11	5%	2	2%	4	3%	42	12%	12	7%	20	12%
Age	101	5	2%	5	2%	9	9%	3	2%	48	13%	11	7%	20	12%
Medical Expenses	99	2	1%	9	4%	8	8%	3	2%	48	13%	10	6%	19	11%
Resources	86	8	4%	8	4%	4	4%	3	2%	35	10%	9	5%	19	11%
Shelter Expense	82	6	3%	8	4%	5	5%	3	2%	34	10%	8	5%	18	11%
Household Composition	76	4	2%	8	4%	6	6%	2	1%	32	9%	7	4%	17	10%

- Click the **Show Criteria** button to display the selected criteria as seen below.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Manager to print and Export the data.

- Selecting **Print** generates an Excel file with the on-screen report output. Selected columns will appear in the printed output.
- The **Export** option allows export to Excel.

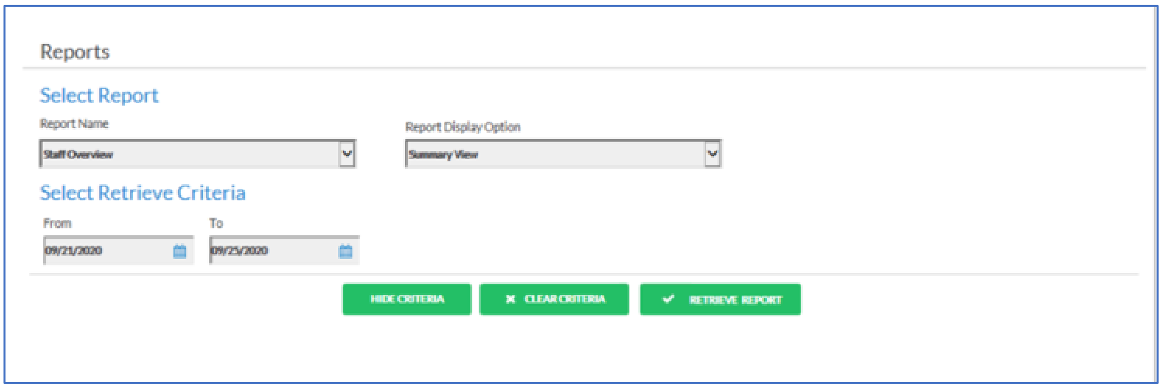
6. Staff Overview Report

The Regional Manager can generate the **Staff Overview** report from the **Reports** page of ANGIE. This report provides information about the Staff in terms of their login times, logout times, hours in system, hold and return activity based on a date range.

In R2, the report will be updated to change the **Name** field to **Staff** in the report, include the time of the staff action and to retrieve the work assignment selection for the Eligibility Specialists.

<u>Staff Overview Report – Summary View</u>

- After selecting **Staff Overview** from the Report Name dropdown, the Regional Manager must select a view from **Report Display Option** dropdown consisting of **Summary view** and **Detail view**. The screen below shows when **Summary view** is selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range.



- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria as seen below.

- Click the **Show Criteria** button to display the criteria as seen below.

The columns for this report consist of Date, Staff, Role, Login Time, Logout Time, Hours in System, Returns, Hold Duration (Mins), Supervisor, Manager, and Regional. All columns are sortable.

Changes in R2:

The Regional Manager can filter the results through the following search options in the **Summary** view:

- When **Search by Responsibility** is selected, the Manager will have the options of **Supervisor**, **Manager**, or **Regional**. Once the responsibility is selected, the Manager will be able to search for a name in this responsibility group to narrow down the results. This filter will retrieve all cases transmitted by staff in the specified organization.
- When **Search by Role** is selected, the Manager will have the options of **All**, **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, and **Clerical Associate** as seen below.
- When **Search by Staff Name** is selected, the Manager will enter the staff name in the text box that appears. This is a wildcard search and not case sensitive.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and Retrieve (the report):

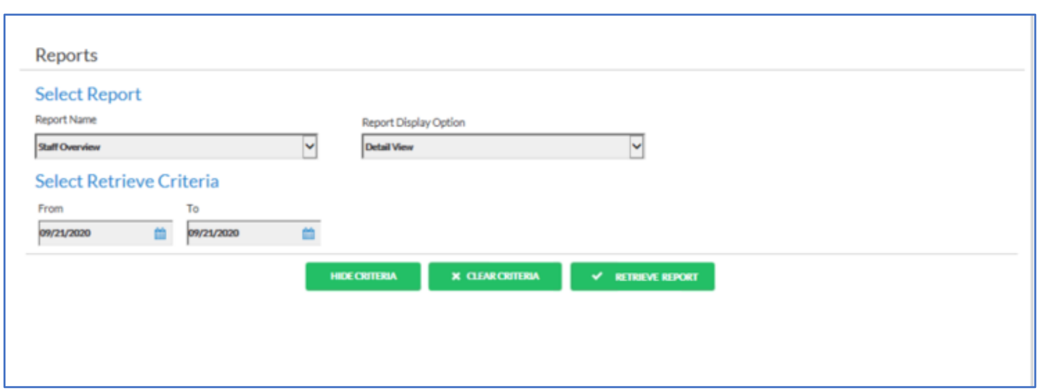
- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- The **Print** and **Export** options allow export to Excel for printing or saving the output.

Staff Overview Report – Detail View

- After selecting **Staff Overview** from the Report Name dropdown, the Regional Manager must select a view from **Report Display Option** dropdown consisting of **Summary view** and **Detail view**. Below screen shows when **Detail View** is selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range.



- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria.

- Click the **Show Criteria** button to display the criteria as seen below.

The columns for this report consist of Date, Staff, Role, Action, Reason, Start Time, End Time, Hold Duration (Mins), Supervisor, Manager, and Regional. All columns are sortable.

Changes in R2:

The Regional Manager can filter the results through the following search options in the **Summary** and **Details** views:

- When **Search by Responsibility** is selected, the Manager will have the options of **Supervisor**, **Manager**, or **Regional**. Once the responsibility is selected, the Manager will be able to search for a name in this responsibility group to narrow down the results. This filter will retrieve all cases transmitted by staff in the specified organization.
- When **Search by Role** is selected, the Manager will have the options of **All**, **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, and **Clerical Associate** as seen below.
- When **Search by Staff Name** is selected, the Manager will enter the staff name in the text box that appears. This is a wildcard search and not case sensitive.
- When Action is **Log In**, the Reason column will display **Interviews** if the Eligibility Specialist selected **Interviews** in the Work Assignment pop-up while logging in.
- When Action is **Log In**, the Reason column will display **Processing** if the Eligibility Specialist selected **Processing** in the Work Assignment pop-up while logging in.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting Print generates an Excel file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

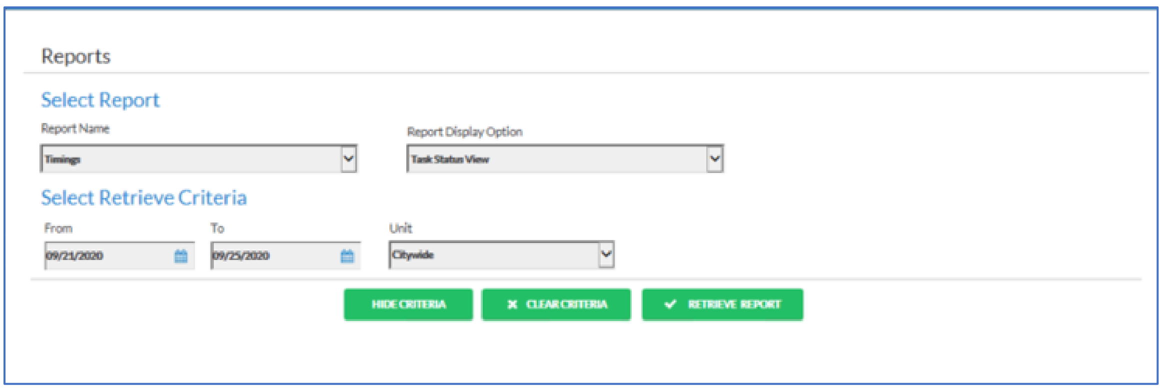
7. Timings Report

The Regional Manager can generate the Timings report from the Reports page of ANGIE. This report provides information on the time taken to complete the work in Streamlined Paperless Office System (SPOS) activities so that the Regional Manager can determine how long actions are taken at each step of the lifecycle.

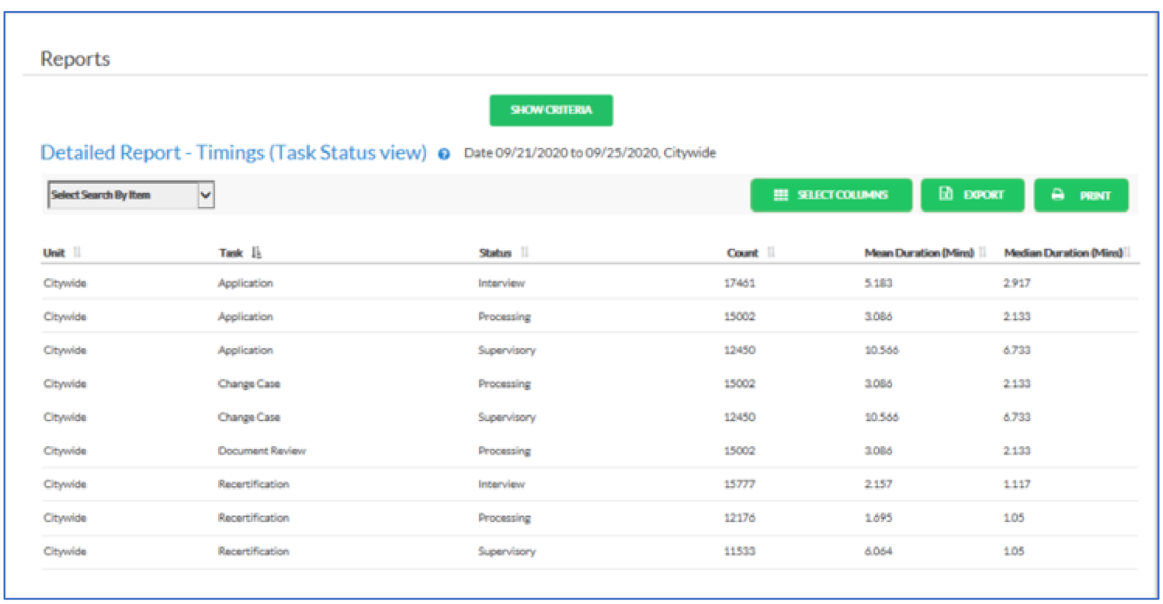
In R2, the report will be updated to include **Periodic Report** and **Interim Report** data so that managers can review the number and averages for tasks and activities completed by staff processing these actions.

<u>Timings Report – Task Status View</u>

After selecting the **Timings** option from the Report Name dropdown, the **Report Display Option** dropdown consisting of **Task Status View** and **Activity View** will be displayed. The screen below shows **Task Status View** selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range. From the **Unit** dropdown, the Regional Manager must select an option consisting of **Citywide**, **Regional**, and **Manager**. The screen below shows **Citywide** selected.

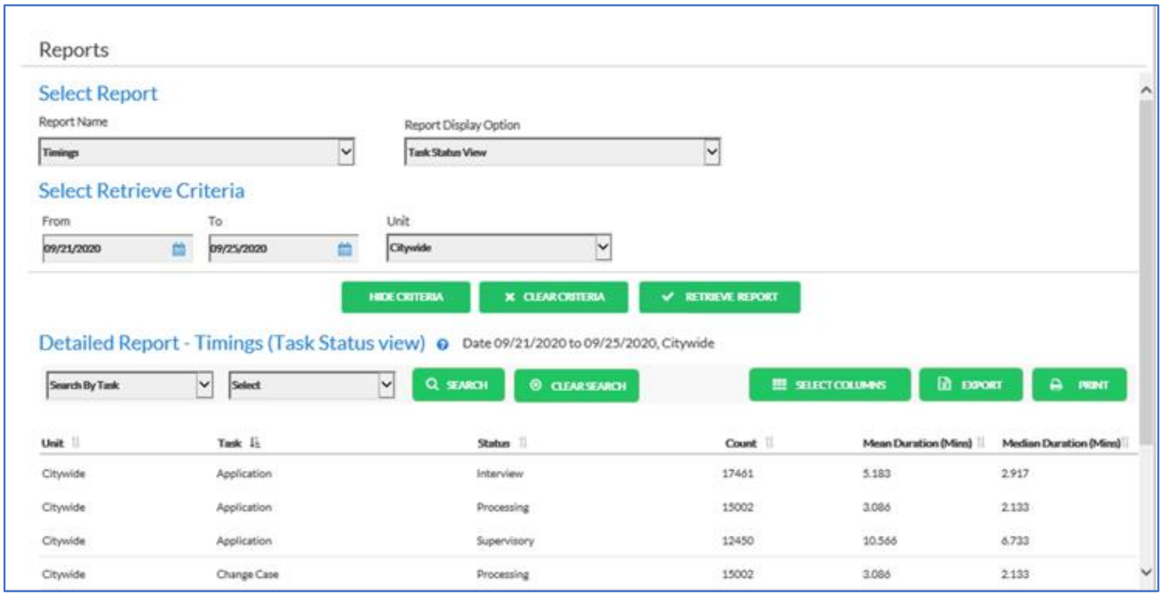


- Selecting the **Retrieve Report** button displays the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.



Unit	Task	Status	Count	Mean Duration (Mins)	Median Duration (Mins)
Citywide	Application	Interview	17461	5.183	2.917
Citywide	Application	Processing	15002	3.086	2.133
Citywide	Application	Supervisory	12450	10.566	6.733
Citywide	Change Case	Processing	15002	3.086	2.133
Citywide	Change Case	Supervisory	12450	10.566	6.733
Citywide	Document Review	Processing	15002	3.086	2.133
Citywide	Recertification	Interview	15777	2.157	1.117
Citywide	Recertification	Processing	12176	1.695	1.05
Citywide	Recertification	Supervisory	11533	6.064	1.05

- Click the **Show Criteria** button to display the screen below.



Within the **Detailed Report** section, the Regional Manager can further **Search By Task** consisting of **Applications**, **Recertifications**, **Case Changes**, **Document Reviews**. This will further refine the search results based on the selected **Task**. The columns for this report consist of **Unit**, **Task**, **Status**, **Count**, **Mean Duration (Mins)**, and **Median Duration (Mins).** All columns are sortable.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

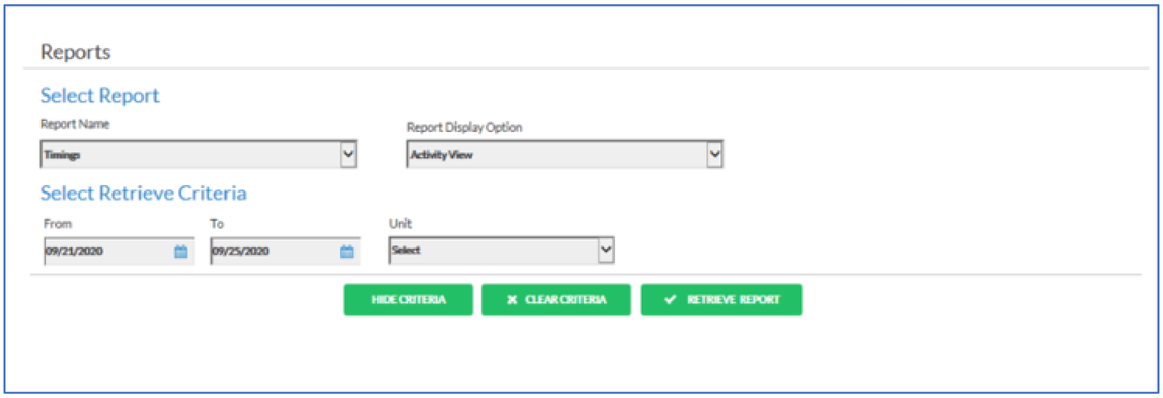
- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

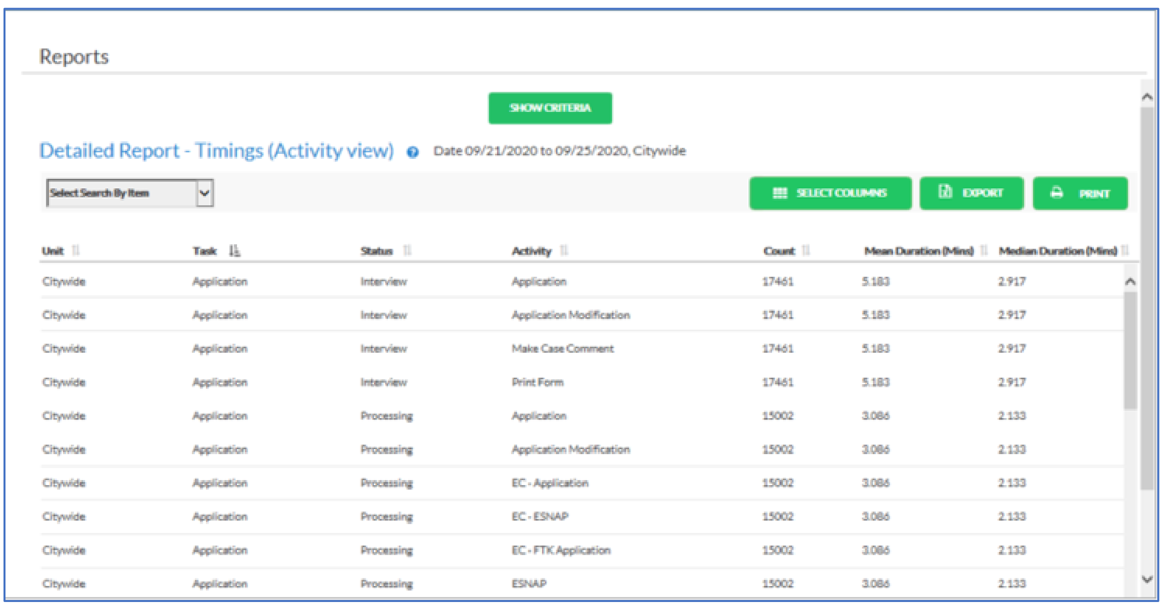
- Selecting **Print** generates an Excel file with the on-screen report output. Selected columns will appear in the printed output.
- The **Export** option allows export to Excel.

<u>Timings Report – Activity View</u>

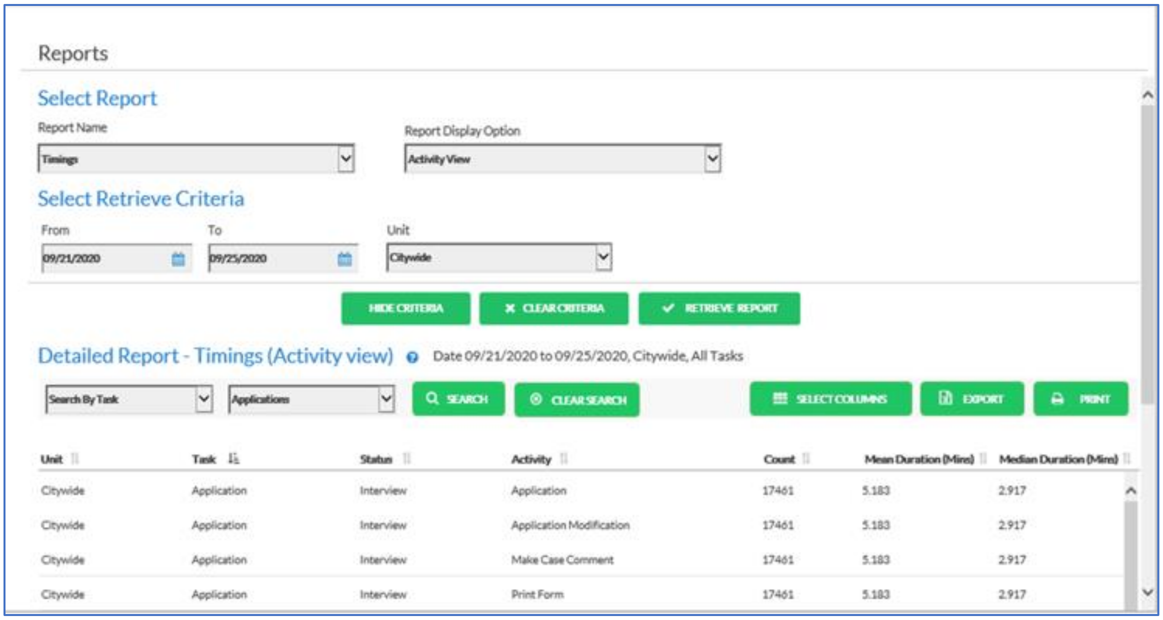
After selecting the **Timings** option from the Report Name dropdown, the **Report Display Option** dropdown consisting of **Task Status View** and **Activity View** will display. The screen below shows **Activity View** selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range. From the **Unit** dropdown, the Regional Manager must select an option consisting of **Citywide**, **Regional**, and **Manager**. The screen below shows **Citywide** selected.



- Selecting the **Retrieve Report** button displays the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.



Click the **Show Criteria** button to display the screen below.



Within the Detailed Report section, the Regional Manager can further **Search By Task** consisting of **Applications**, **Recertifications**, **Case Changes**, **Document Reviews**, **Interim Reports** and **Periodic Reports**. This will further refine the search results based on the selected Task. The columns for this report consist of **Unit**, **Task**, **Status**, **Activity**, **Count**, **Mean Duration (Mins)**, and **Median Duration (Mins).** All columns are sortable.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting **Print** generates an Excel file with the on-screen report output. Selected columns will appear in the printed output.
- The **Export** option allows export to Excel.

Help Text displayed for **Timings Report** on the **Detailed Report** section:

8. Work Outstanding Report

The Regional Manager can generate the **Work Outstanding report** from the **Reports** page of ANGIE. This report provides information on the work that is outstanding based on the criticality.

This report contains the following columns that tracks these tasks at each stage of their lifecycle.

- The **Potential Work** column displays the count of Recertification files created, Periodic Report file created (periodic report not yet submitted and not clocking down in WMS), and Interim Report file created (interim report not yet submitted and not clocking down in WMS).
- The **Open Task** column counts **Applications** or **Recertification** cases submitted but the interview has not started (and not Ready to Process or clocking down in WMS).
- The **Deferred** column displays counts of **Applications** and **Recertifications** with completed interviews that have been deferred (excludes Expedited Supplemental Nutrition Assistance Program (ESNAP) and deferred **Case Changes**.
- The **E.S. Ready to Assign** column header counts the cases that are “Ready to Assign” (ready to be processed) broken down by the trigger that made the case “Ready”, such as ESNAP Ready, Resource File Integration (RFI)/Information Verification Service (IVS)/SDX Received, No Deferral, Failed to Keep (FTK), Mandated Verification Received, Mandated Verification Not Received by Due Date, Returned by Supervisor, Returned by WMS – Error Correction, and Adverse Action Pause.
  - The following additional triggers are only related to Periodic Reports: Income Clearance Program (ICP) Web Periodic Report Complete, Received via Access Human Resources Administration (AHRA), Late Periodic Report.
  - The following additional triggers are only related to Interim Reports: Interim Report Complete, Received via AHRA, Late Interim Report.
- The **Supervisor Ready to Assign** column counts the cases that are “Ready for Sign-off”.
- The **Total Work** column reflects the sum of **Open Task**, **Deferred**, **ES Ready to Assign**, and **Supervisor Ready to Assign**.
- The **Transmitted to WMS** column header counts the cases that were transmitted to Welfare Management System (WMS) broken down by those cases that were reviewed by a Supervisor and transmitted and those cases that bypassed Supervisor review and were directly transmitted to WMS.

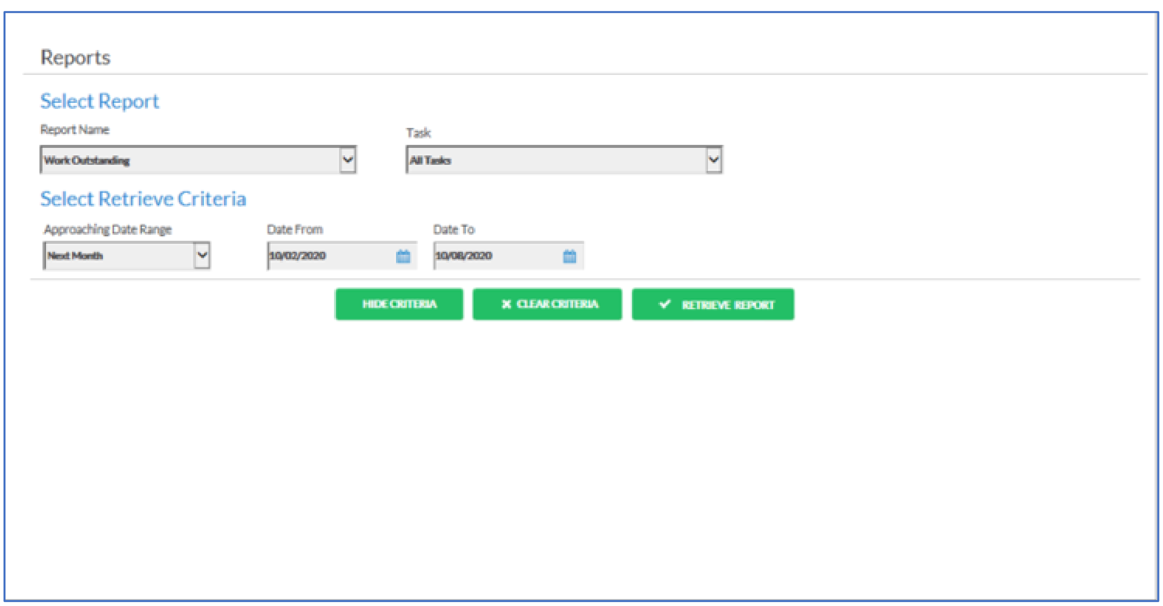
- The **Pending in WMS** column header counts the cases that are clocking down in WMS both the directly transmitted and Supervisor reviewed cases.
- The **Complete** column header displays counts of completed cases broken down by descriptive status of case completion such as, **Active Case**, **Rejection, Withdrawal**, **Duplicate App**, **Closed**, and **No Change** or **Change** (for Case Changes).
    - The following additional descriptive status of case completion are only related to **Periodic** and **Interim Reports**: **Processed**, **Added to Recertification**, **Forced Closed by WMS** (968), **Complete / No change** (No WMS Transmit), **Deferred/Pending Change Verification** (SNAP Change Case), **Processed Change / Deferred** (Active Case).

In addition to **Application**, **Recertification**, **Case Change**, and **Document Review** tasks; **Periodic Report** and **Interim Report** tasks will be added to the **Work Outstanding** report.

<u>Work Outstanding Report – All Tasks</u>
After selecting the **Work Outstanding** option from the **Report Name** dropdown, the **Task** dropdown consisting of **All Tasks**, **Applications Application Pending** (**AP**), **Application Single Issue** (**SI**), **Case Changes**, **Document Reviews**, **Recertifications**, **Periodic Reports**, **Interim Reports**, and **All Tasks Export** will display. The screen below shows **All Tasks** selected.

- The Regional Manager will then see the **Select Retrieve Criteria** section and must select an option from the **Approaching Date Range** dropdown consisting of **Next 7 days**, **This Month**, **Next Month**, and **Date Range**.

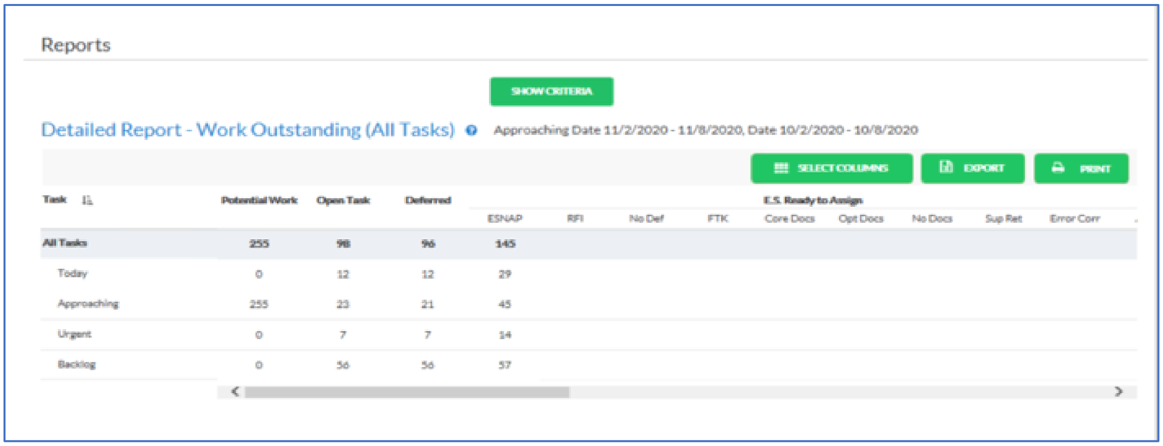
The screen below shows **Next Month** selected.



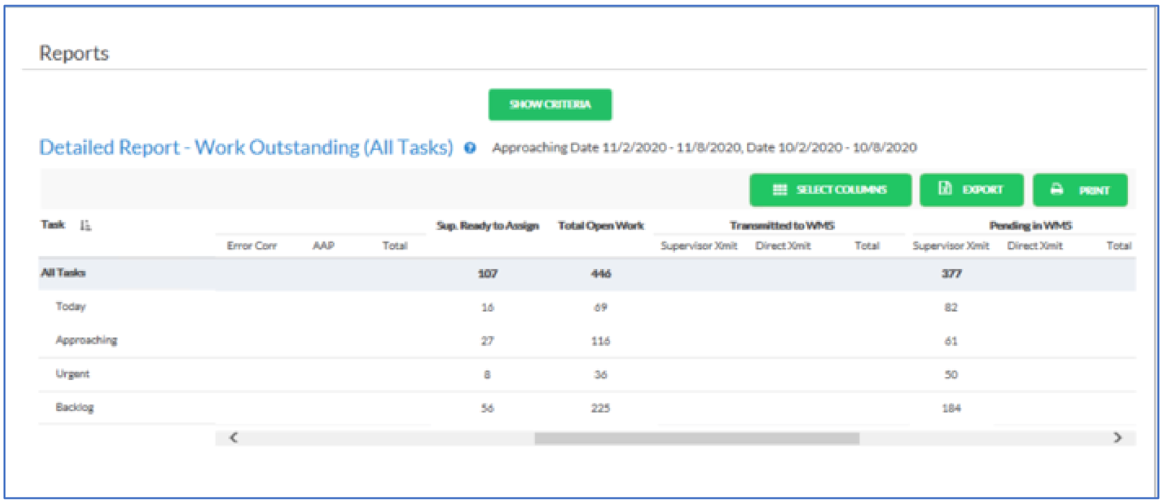
Note:

- When the **Task** filter is set as **Applications (AP)**, the Regional Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP file dates for the report output.
- When the **Task** filter is set as **Applications (SI)**, the Regional Manager must have an additional filter of **Task Due Date** that allows them to set the date range of due dates for the report output.
- When the Task is selected as **Recertifications**, the manager must select the **Interview Month**, replacing the Date filter.
- When the **Task** filter is set as **Case Changes**, the Regional Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **Document Reviews**, the Regional Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the Task is selected as **Periodic Report**, the manager must select the **Periodic Report Month From** and **Periodic Report Month To** fields.
- When the Task is selected as **Interim Report**, the manager must select the **Interim Report Month From** and **Interim Report Month To** fields.
- When the Task filter is set to **All Tasks** or **All Tasks Export**, the manager must select the **Month From** and **Month To** values:
  - For Applications in **AP** status, the months selected is used as the file date retrieval range.
  - For Applications in **SI** status, the months selected is used as the task due date retrieval range.
  - For Recertifications, the months selected is used as the interview month for the retrieval.
  - For **Case Changes**, the months selected is used as the submission date retrieval range.
  - For **Document Reviews**, the months selected is used as the submission date retrieval range.
  - For **Periodic Reports**, the full periodic report due month(s) for the selected month is used for the retrieval.
  - For **Interim Reports**, the full interim report due month(s) for the selected month is used for the retrieval.

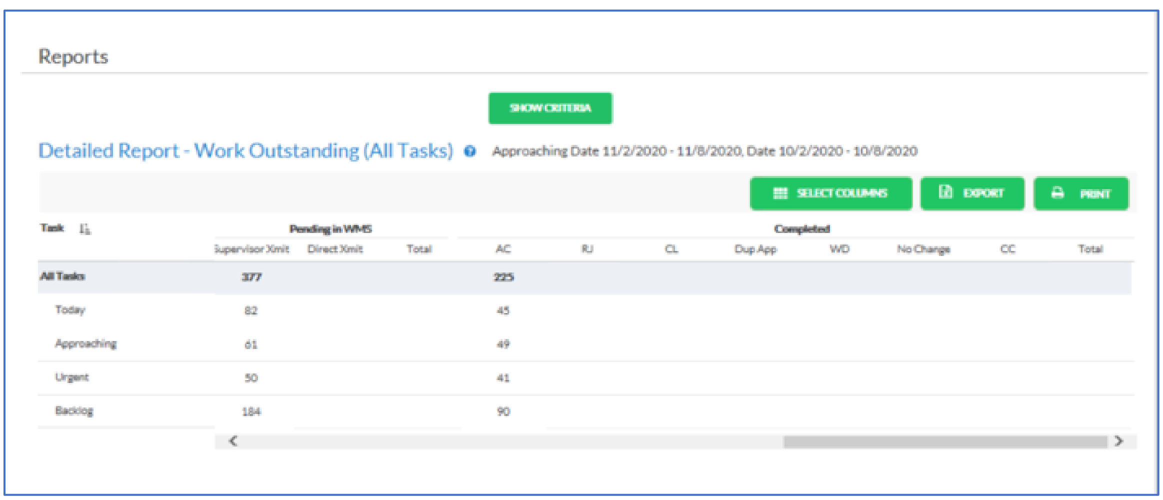
- Selecting the **Retrieve Report** button displays the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.



Task	Potential Work	Open Task	Deferred	E.S. Ready to Assign								
				ESNAP	RFI	No Def	FTK	Core Docs	Opt Docs	No Docs	Sup Ret	Error Corr
All Tasks	255	98	96	145								
Today	0	12	12	29								
Approaching	255	23	21	45								
Urgent	0	7	7	14								
Backlog	0	56	56	57								

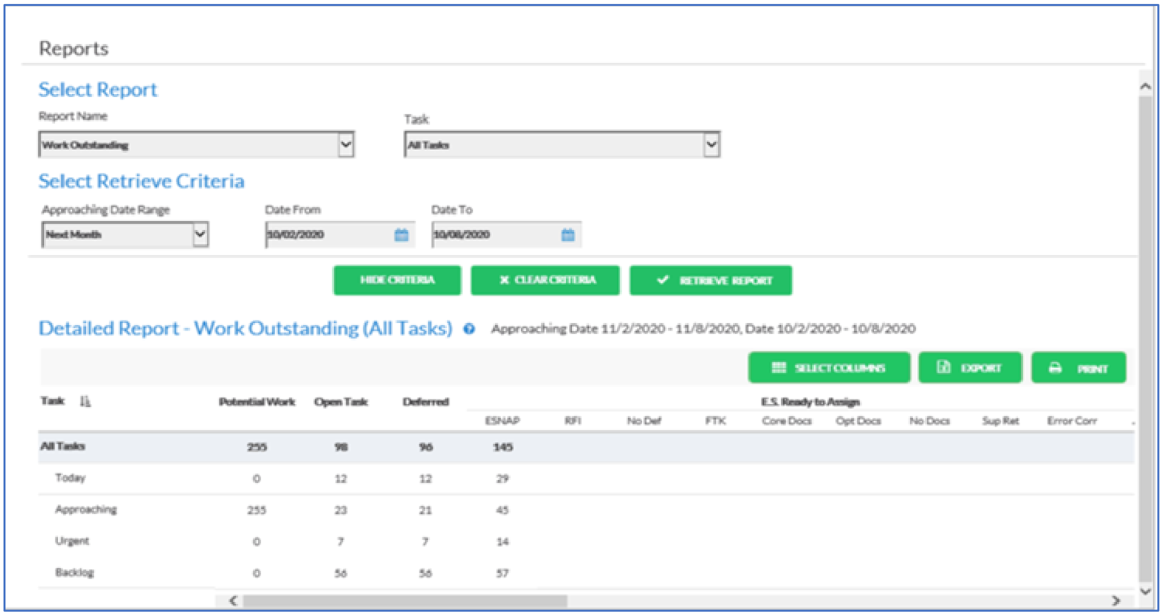


Task				Sup. Ready to Assign	Total Open Work	Transmitted to WMS			Pending in WMS		
	Error Corr	AAP	Total			Supervisor Xmit	Direct Xmit	Total	Supervisor Xmit	Direct Xmit	Total
All Tasks				107	446				377		
Today				16	69				82		
Approaching				27	116				61		
Urgent				8	36				50		
Backlog				56	225				184		



Task	Pending in WMS			Completed							
	Supervisor Xmit	Direct Xmit	Total	AC	RJ	CL	Dup App	WD	No Change	CC	Total
All Tasks	377			225							
Today	82			45							
Approaching	61			49							
Urgent	50			41							
Backlog	184			90							

- Click the **Show Criteria** button to display the screen below.



Based on the option selected from the **Task** dropdown, the report will provide the information for the same as seen in the above screen. Since **All Tasks** was selected, information for **All Tasks** will be displayed within the **Task** column of the **Detailed Report**. The report further breaks down **All Tasks** across data rows consisting of:

- **Today** - Priority Date Today
- **Approaching** - Coming Due with priority Date in selected date range
- **Urgent** - Late, past Priority Date before Task Due Date
- **Backlog** - Overdue, past Task Due Date

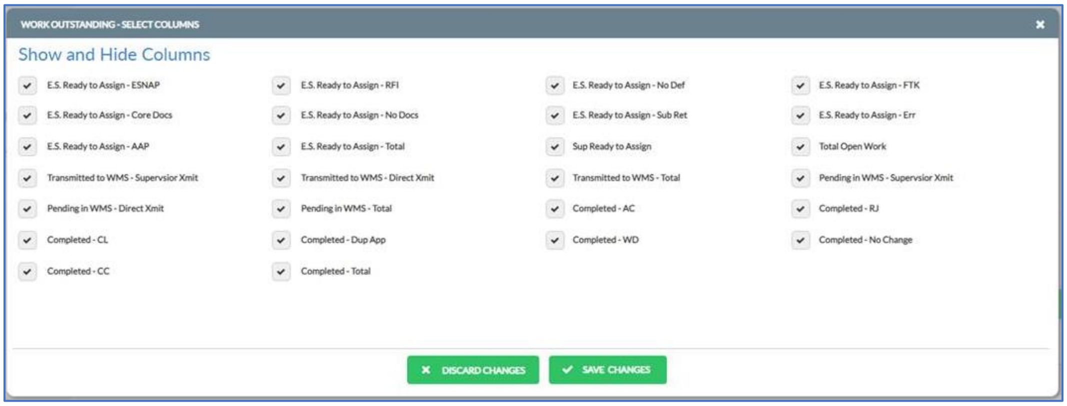
The horizontal **Scroll** bar allows the Regional Manager to scroll horizontally. The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- The **Print** and **Export** option allows export to Excel.
- The export of the **Work Outstanding** report will be updated to separate the task from the urgency (Today, Approaching, Urgent, Backlog).

- Upon clicking the **Select Columns** button, a modal window will display for the Regional Manger to choose the desired columns for the report as seen below. **Save changes** will apply only to the selected columns of the report.



9. New Performance Management – Supervisor Returns Report

The new **Performance Management – Supervisor Returns** report will include two views to allow monitoring of task disapproved by supervisors and returned to workers for re-processing:

- The **Summary** view shows the number of tasks disapproved by supervisors, the total tasks sent for supervisor approval, and the **Return Rate** for each staff member in the selected date range.
- The **Detail** view shows the corresponding SPOS Section and case number of each **Supervisor Return**.

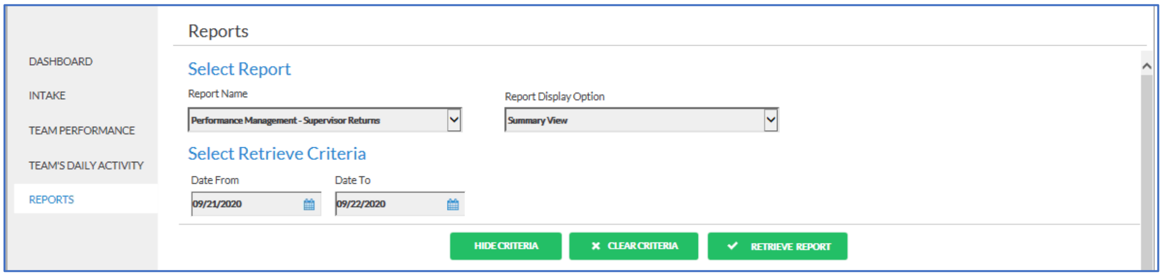
Performance Management – Supervisor Returns: Summary View

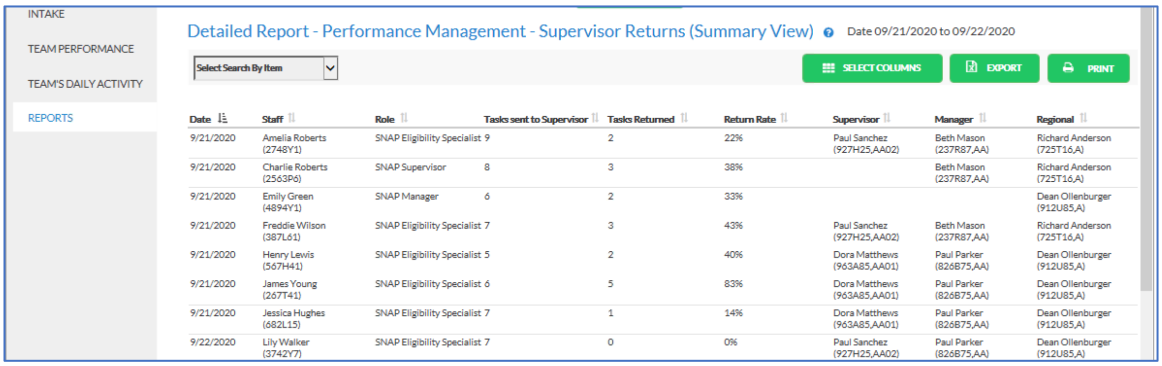
The **Summary** view includes the following data elements:

- **Date** – Date that the approval was completed or returned to the worker.
- **Staff** – Name and WMS ID of the staff member.
- **Role** – Role of the staff member.
- **Tasks sent to Supervisor** – The number of tasks on which the particular staff member worked which were sent for supervisor's approval.
- **Tasks Returned** – The number of tasks on which the particular staff member worked, but were returned by the supervisor.
- **Return Rate** – Percentage of tasks returned.
- **Supervisor** – Name and WMS ID of the supervisor associated with the staff member.
- **Manager** – Name and WMS ID of the manager associated with the staff member.
- **Regional** – Name and WMS ID of the regional associated with the staff member.

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





The manager can filter the results through the following search options:

- **Search by Responsibility**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **Supervisor**, **Manager**, **Regional**. Once the responsibility is selected, the Manager will be displayed with a field to enter the name in this responsibility group to narrow down the results from the retrieved dataset.
- **Search by Role**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are All, SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, and **Clerical Associate**.
- **Search by Staff Name**: When this filter is set, the Manager will be displayed with a field to enter the staff's name. This is a wildcard search and not case sensitive.

Performance Management – Supervisor Returns: Details View

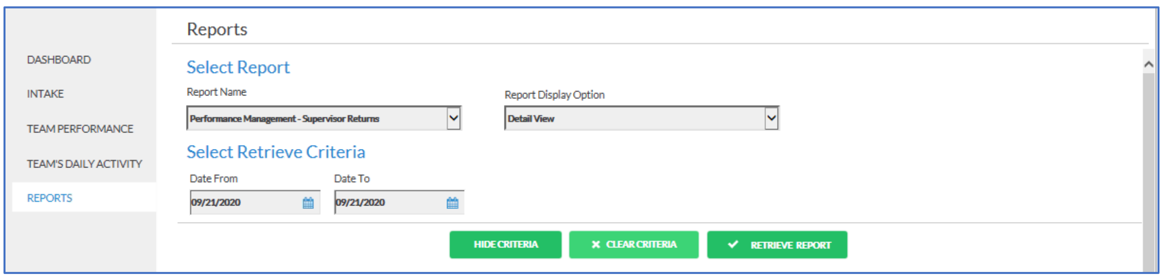
The **Details** view includes the following data elements:

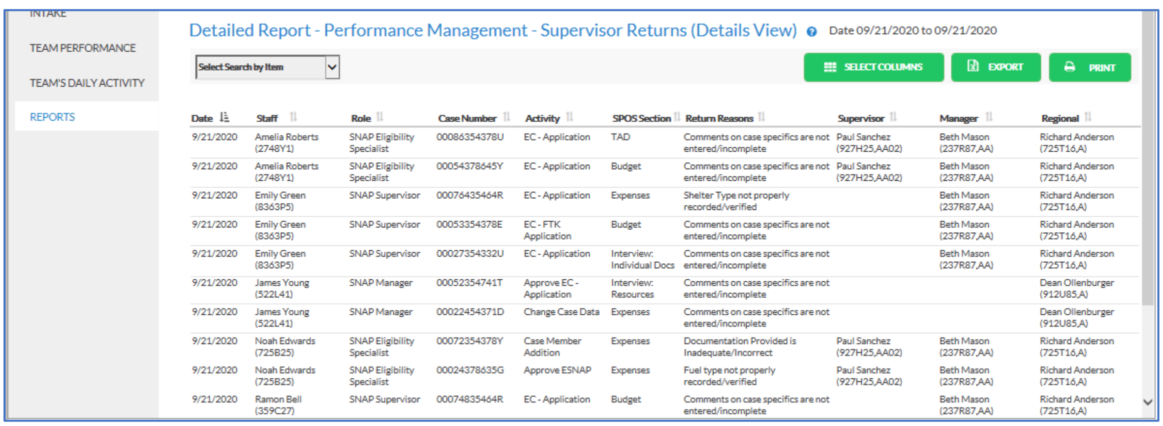
- **Date** – Date that the approval was completed or returned to the worker.
- **Staff** – Name and WMS ID of the staff member
- **Role** – Role of the staff member.
- **Case Number** – Case number for the task that was returned by the supervisor.

- **Activity** – Activity for the task that was returned by the supervisor.
- **SPOS Section** – Disapproved section or question for the task that was returned by the supervisor.
- **Return Reasons** – Disapproved reasons selected in the section or question for the task that was returned by the supervisor.
- **Supervisor** – Name and WMS ID of the supervisor associated with the staff member.
- **Manager** – Name and WMS ID of the manager associated with the staff member.
- **Regional** – Name and WMS ID of the regional associated with the staff member.

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





Date	Staff	Role	Case Number	Activity	SPOS Section	Return Reasons	Supervisor	Manager	Regional
9/21/2020	Amelia Roberts (2748Y1)	SNAP Eligibility Specialist	00086354378U	EC - Application	TAD	Comments on case specifics are not entered/incomplete	Paul Sanchez (927H25,AA02)	Beth Mason (237R87,AA)	Richard Anderson (725T16,A)
9/21/2020	Amelia Roberts (2748Y1)	SNAP Eligibility Specialist	00054378645Y	EC - Application	Budget	Comments on case specifics are not entered/incomplete	Paul Sanchez (927H25,AA02)	Beth Mason (237R87,AA)	Richard Anderson (725T16,A)
9/21/2020	Emily Green (8363P5)	SNAP Supervisor	00076435464R	EC - Application	Expenses	Shelter Type not properly recorded/verified		Beth Mason (237R87,AA)	Richard Anderson (725T16,A)
9/21/2020	Emily Green (8363P5)	SNAP Supervisor	00053354378E	EC - FTK Application	Budget	Comments on case specifics are not entered/incomplete		Beth Mason (237R87,AA)	Richard Anderson (725T16,A)
9/21/2020	Emily Green (8363P5)	SNAP Supervisor	00027354332U	EC - Application	Interview: Individual Docs	Comments on case specifics are not entered/incomplete		Beth Mason (237R87,AA)	Richard Anderson (725T16,A)
9/21/2020	James Young (522L41)	SNAP Manager	00052354741T	Approve EC - Application	Interview: Resources	Comments on case specifics are not entered/incomplete			Dean Ollenburger (912U85,A)
9/21/2020	James Young (522L41)	SNAP Manager	00022454371D	Change Case Data	Expenses	Comments on case specifics are not entered/incomplete			Dean Ollenburger (912U85,A)
9/21/2020	Noah Edwards (725B25)	SNAP Eligibility Specialist	00072354378Y	Case Member Addition	Expenses	Documentation Provided is Inadequate/Incorrect	Paul Sanchez (927H25,AA02)	Beth Mason (237R87,AA)	Richard Anderson (725T16,A)
9/21/2020	Noah Edwards (725B25)	SNAP Eligibility Specialist	00024378635G	Approve ESNAP	Expenses	Fuel type not properly recorded/verified	Paul Sanchez (927H25,AA02)	Beth Mason (237R87,AA)	Richard Anderson (725T16,A)
9/21/2020	Ramon Bell (359C27)	SNAP Supervisor	00074835464R	EC - Application	Budget	Comments on case specifics are not entered/incomplete		Beth Mason (237R87,AA)	Richard Anderson (725T16,A)

The manager can filter the results through the following search options:

- **Search by Activity**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All** and each activity type.
- **Search by SPOS Section**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All** and each SPOS Section.

- **Search by Responsibility** - When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **Supervisor**, **Manager**, **Regional**. Once the responsibility is selected, the Manager will be displayed with a field to enter the name in this responsibility group to narrow down the results from the retrieved dataset.
- **Search by Role –** When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All**, **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, and **Clerical Associate**.
- **Search by Staff Name –** When this filter is set, the Manager will be displayed with a field to enter the staff's name. This is a wildcard search and not case sensitive.
- **Search by Case Number**: When this filter is set, the Manager will be displayed with a field to enter the case number. Maximum of 12 characters, allow partial entries (when 12 characters are entered, first 11 characters are digits, last character is an alpha).

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

The manager can print or export the output.

10. New Performance Management – WMS Errors Report

The **Performance Management – WMS Errors** report will allow monitoring of WMS error rate and details.

This report will include two views:

- The **Summary** view shows the number of WMS Errors, the total tasks transmitted to WMS, and the Error Rate for each staff member in the selected date range.
- The **Details** view shows the corresponding Error Code, Error Description, and case number of each WMS Error.

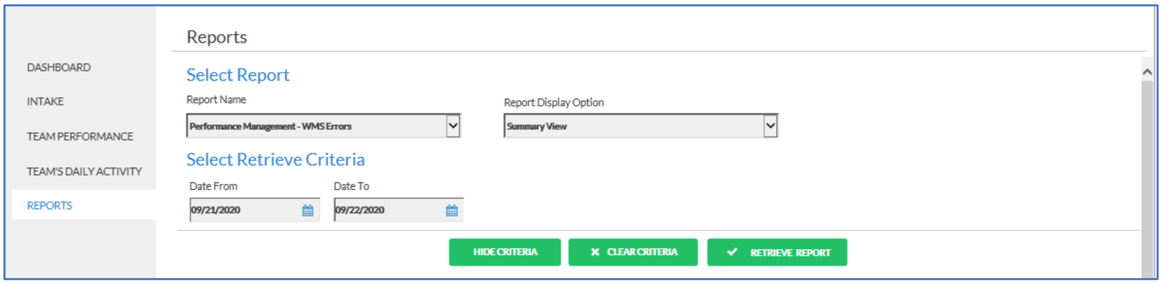
Performance Management – WMS Errors: Summary View
The **Summary** view includes the following data elements:

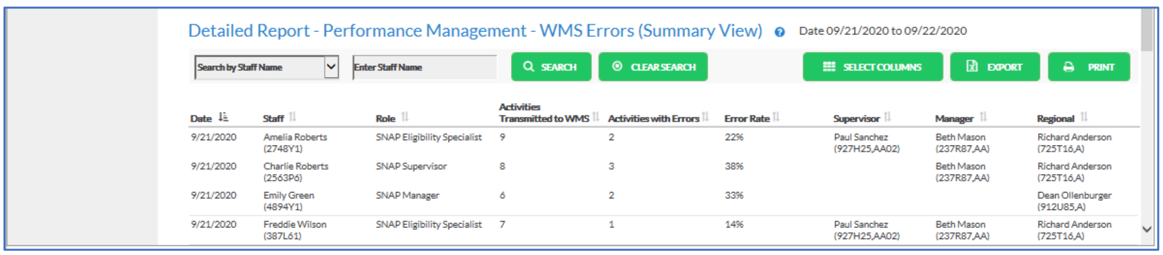
- **Date** – Transmission date
- **Staff** – Name and WMS ID of the staff member
- **Role** – Role of the staff member
- **Activities Transmitted to WMS** – Total of activities transmitted to WMS
- **Activities with Errors** – Total of activities with errors to WMS
- **Error Rate** – Percentage of activities with errors in WMS
- **Supervisor** – Name and WMS ID of the supervisor associated with the staff member

- **Manager** – Name and WMS ID of the manager associated with the staff member
- **Regional** – Name and WMS ID of the regional associated with the staff member

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





The manager can filter the results through the following search options:

- **Search by Responsibility**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **Supervisor**, **Manager**, **Regional**. Once the responsibility is selected, the Manager will be displayed with a field to enter the name in this responsibility group to narrow down the results from the retrieved dataset.
- **Search by Role**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All**, **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, and **Clerical Associate**.
- **Search by Staff Name**: When this filter is set, the Manager will be displayed with a field to enter the staff's name. This is a wildcard search and not case sensitive.

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

The manager can print or export the output.

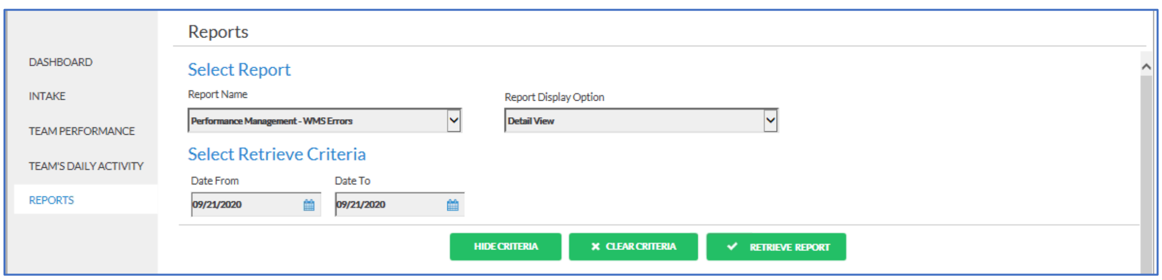
<u>Performance Management – WMS Errors: Details View</u>

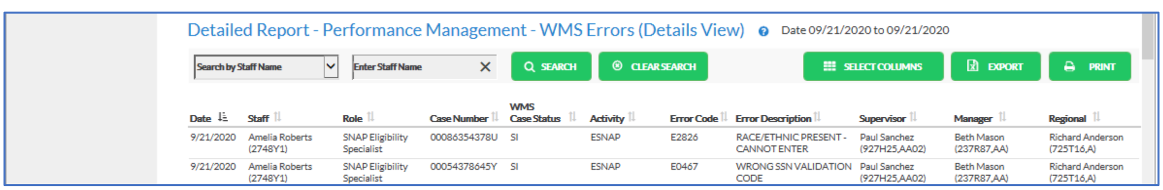
The **Summary** view includes the following data elements:

- **Date** – Transmission date
- **Staff** – Name and WMS ID of the staff member
- **Role** – Role of the staff member
- **Case Number**
- **WMS Case Status – The WMS Status at the time the Error Correction was generated**
- **Activity** – The associated SPOS activity which was performed by the staff member
- **Error Code** – Error code generated by WMS
- **Error Description** – Description for the error code generated by WMS
- **Supervisor** – Name and WMS ID of the supervisor associated with the staff member
- **Manager** – Name and WMS ID of the manager associated with the staff member
- **Regional** – Name and WMS ID of the regional associated with the staff member

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





The manager can filter the results through the following search options:

- **Search by Responsibility**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **Supervisor**, **Manager**, **Regional**. Once the responsibility is selected, the Manager will be displayed with a field to enter the name in this responsibility group to narrow down the results from the retrieved dataset.
- **Search by Role**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All**, **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, and **Clerical Associate**.

- **Search by Activity**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All** and each activity type.
- **Search by Staff Name**: When this filter is set, the Manager will be displayed with a field to enter the staff's name. This is a wildcard search and not case sensitive.
- **Search By WMS Error Code**: When this filter is set, the Manager will be displayed with a field to enter the error code. The Manager will be able to enter three or four numerical digits to perform a fuzzy search on the WMS Error code column to retrieve all rows with Error codes that match.
- **Search By Error Description**: When this filter is set, the Manager will be displayed with a field to enter the error description. This is a wildcard search and not case sensitive.
- **Search by Case Number**: When this filter is set, the Manager will be displayed with a field to enter the case number. Maximum of 12 characters, allow partial entries (when 12 characters are entered, first 11 characters are digits, last character is an alpha).
- **Search by WMS Case Status:** When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are All, Applying (**AP**), Active (**AC**), Closed (**CL**), Denied (**RJ**) and Single Issue (**SI**).

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

The manager can print or export the output.

11. New Performance Management – Deferrals Report

The new **Performance Management – Deferrals** report will provide the summary and details of cases deferred for each staff member in the selected date range, including a breakdown of the eligibility factors and case number of each deferral.

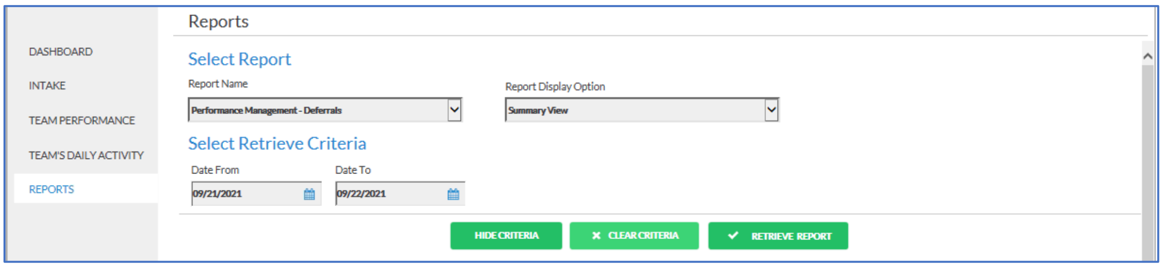
Performance Management – Deferrals: Summary View
The **Summary** view includes the following data elements:

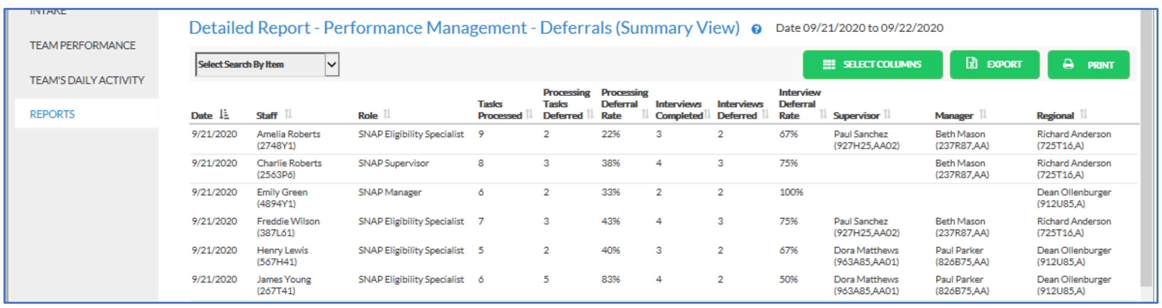
- **Date** – Deferral date
- **Staff** – Name and WMS ID of the staff member
- **Role** – Role of the staff member
- **Tasks Processed** – Total of processing tasks completed on the date
- **Processing Tasks Deferred** – Total of processing tasks with a deferral completed on the date
- **Processing Deferral Rate** – Percentage of completed processing tasks with a deferral
- **Interviews Completed** – Total of completed interviews on the date
- **Interviews Deferred** – Total of completed interviews with a deferral on the date
- **Interview Deferral Rate** – Percentage of completed interviews with a deferral

- **Supervisor** – Name and WMS ID of the supervisor associated with the staff member
- **Manager** – Name and WMS ID of the manager associated with the staff member
- **Regional** – Name and WMS ID of the regional associated with the staff member

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





The manager can filter the results through the following search options:

- **Search by Responsibility**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **Supervisor**, **Manager**, **Regional**. Once the responsibility is selected, the Manager will be displayed with a field to enter the name in this responsibility group to narrow down the results from the retrieved dataset.
- **Search by Role**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All**, **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, and **Clerical Associate**.
- **Search by Staff Name**: When this filter is set, the Manager will be displayed with a field to enter the staff's name. This is a wildcard search and not case sensitive.

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

The manager can print or export the output.

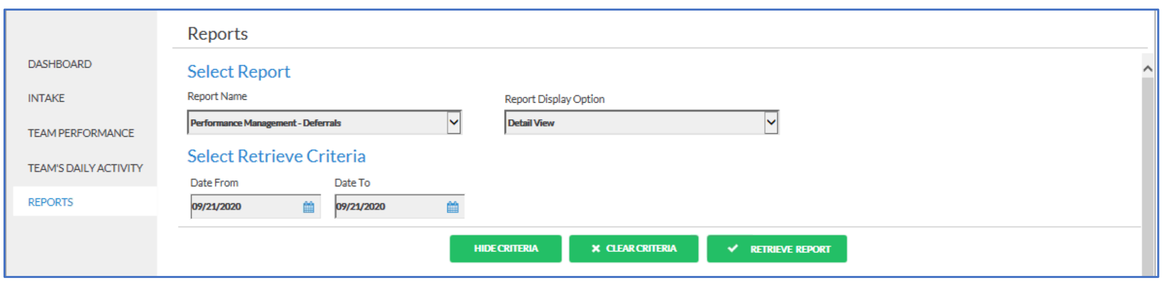
<u>Performance Management – Deferrals: Details View</u>

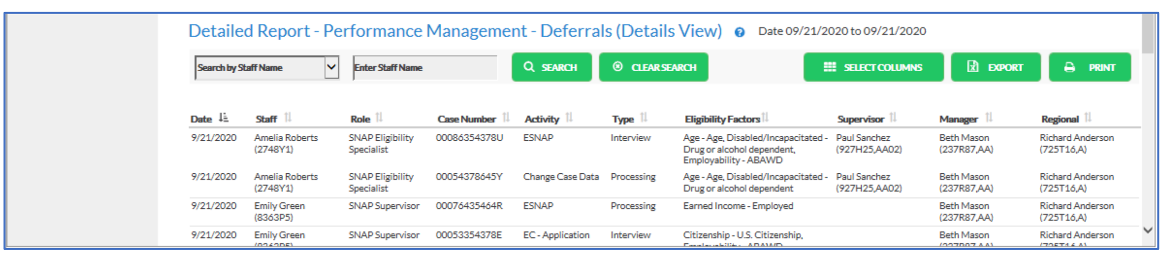
The **Details** view includes the following data elements:

- **Date** – Deferral date
- **Staff** – Name and WMS ID of the staff member
- **Role** – Role of the staff member
- **Case Number** – Case Number of the case which was deferred
- **Activity** – The associated SPOS activity which was performed by the staff member
- **Type –** The type of task completed, depending upon whether the case was deferred during interview or processing.
- **Eligibility Factors –** A list of unique eligibility factors for which the case was deferred
- **Supervisor** – Name and WMS ID of the supervisor associated with the staff member
- **Manager** – Name and WMS ID of the manager associated with the staff member
- **Regional** – Name and WMS ID of the regional associated with the staff member

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





The manager can filter the results through the following search options:

- **Search by Activity**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All** and each activity type.
- **Search by Responsibility**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are Supervisor,

Manager, Regional. Once the responsibility is selected, the Manager will be displayed with a field to enter the name in this responsibility group to narrow down the results from the retrieved dataset.

- **Search by Role**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The options are **All**, **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, and **Clerical Associate**.
- **Search By Type**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The Options are **Interview** and **Processing**.
- **Search By Eligibility Factors**: When this filter is set, the Manager will be displayed with a dropdown to select from available options. The Options are **All** and each **Eligibility Factor Category**.
- **Search by Staff Name**: When this filter is set, the Manager will be displayed with a field to enter the staff's name. This is a wildcard search and not case sensitive.
- **Search by Case Number**: When this filter is set, the Manager will be displayed with a field to enter the case number. Maximum of 12 characters, allow partial entries (when 12 characters are entered, first 11 characters are digits, last character is an alpha).

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

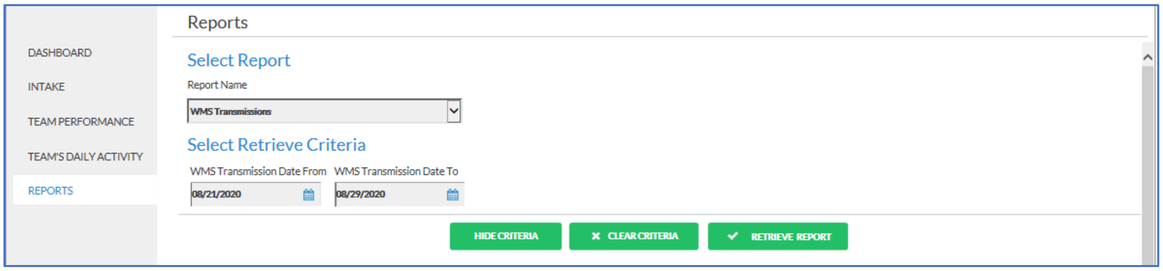
The manager can print or export the output.

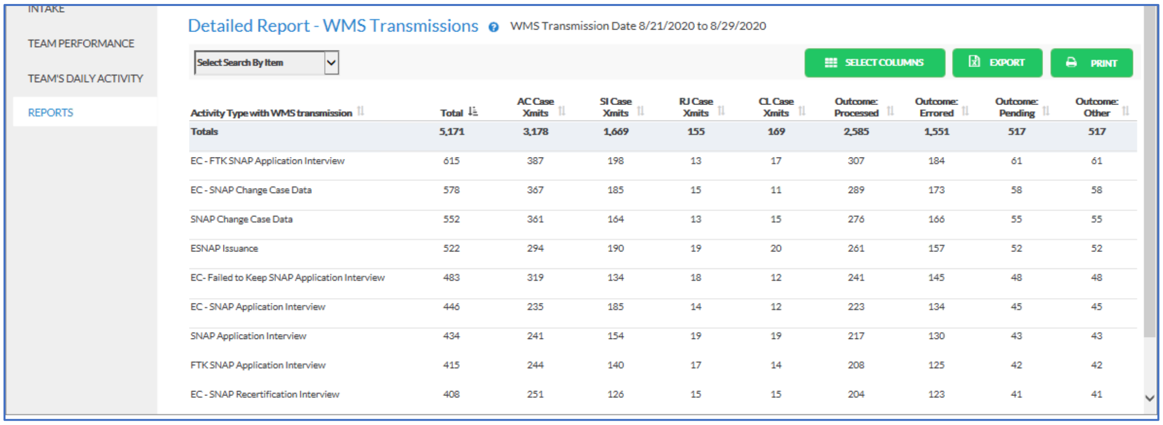
12. New WMS Transmissions Report

The new **WMS Transmissions** report will compare the number of cases transmitted to WMS across different case statuses and provides the results of the outcome from WMS.

Report retrieval:

- The manager must select the **WMS Transmission Date From** and **WMS Transmission Date To** fields and click on **Retrieve Report**.





Activity Type with WMS transmission	Total	AC Case Xmits	SI Case Xmits	RJ Case Xmits	CL Case Xmits	Outcome: Processed	Outcome: Errored	Outcome: Pending	Outcome: Other
Totals	**5,171**	**3,178**	**1,669**	**155**	**169**	**2,585**	**1,551**	**517**	**517**
EC - FTK SNAP Application Interview	615	387	198	13	17	307	184	61	61
EC - SNAP Change Case Data	578	367	185	15	11	289	173	58	58
SNAP Change Case Data	552	361	164	13	15	276	166	55	55
ESNAP Issuance	522	294	190	19	20	261	157	52	52
EC- Failed to Keep SNAP Application Interview	483	319	134	18	12	241	145	48	48
EC - SNAP Application Interview	446	235	185	14	12	223	134	45	45
SNAP Application Interview	434	241	154	19	19	217	130	43	43
FTK SNAP Application Interview	415	244	140	17	14	208	125	42	42
EC - SNAP Recertification Interview	408	251	126	15	15	204	123	41	41

The report will include the following data elements:

- **Activity Type with WMS transmission:** SPOS worker activity type
  - **Total:** Count of total WMS transmissions by outcome for the date range for the respective SPOS activity
- **AC Case Xmits:** count of cases with case status of AC transmitted to WMS
- **SI Case Xmits:** count of cases with case status of SI transmitted to WMS
- **RJ Case Xmits:** count of cases with case status of RJ transmitted to WMS
- **CL Case Xmits:** count of cases with case status of CL transmitted to WMS
- **Outcome: Processed**: count of cases that were transmitted during the selected timeframe and returned as “Processed” (accepted by WMS without Error or Pending)
- **Outcome: Errored**: count of cases that were transmitted during the selected timeframe and returned with a WMS Erro
- **Outcome: Pending**: count of cases that were transmitted during the selected timeframe and returned as “Pending”
- **Outcome: Other:** count of cases that do not meet the Processed, Errored, or Pending criteria

The Manager can filter through the **Search By Processing Center** option. Available options include **All**, **F42** (TIPS 42 citywide site (center number for FIA SNAP users in ANGIE citywide rollout) and **F25** (MMAP site (center number for FIA MMAP users).

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

The manager can print or export the output.

13. New Selective Case Review Summary Report

A new report named **Selective Case Review Summary** will provide information on the number of cases that have been directly transmitted to WMS with the number of cases reviewed by a Supervisor based on the defined SCR rules.

This report includes the error rate for both bypassed and reviewed cases. This report also lets the management review this data across different SCR categories and SPOS activities. The **Selective Case Review Summary** report consists of two views which includes **Summary Per Category** and **Summary Per Activity**.

The report will have 2 views:

- Summary per Category
- Summary per Activity

The following SCR categories will be tracked in this new report:

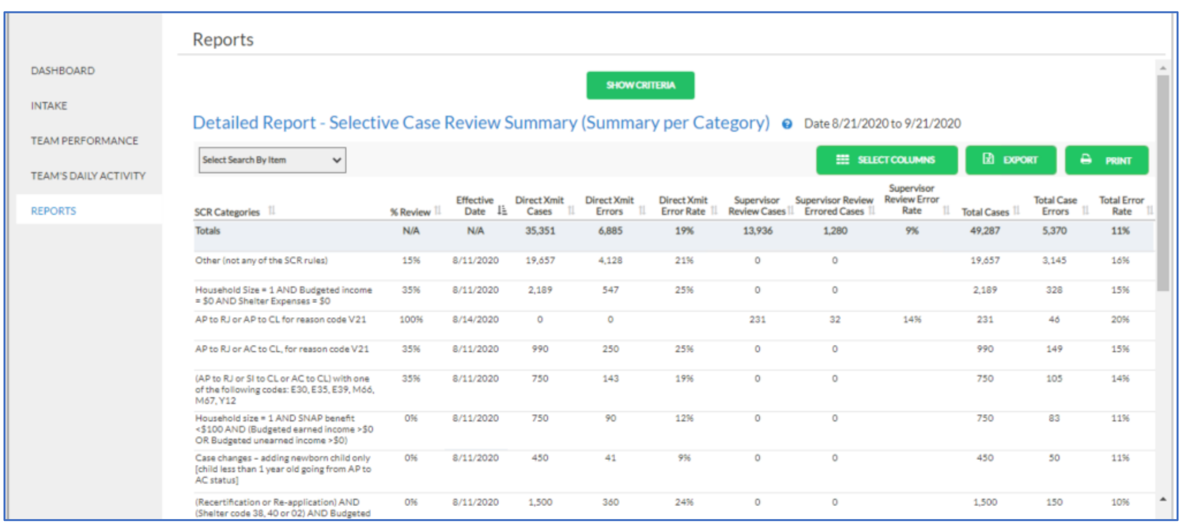
- SCR Categories:
- Other (not any of the SCR rules)
- Household Size = 1 AND Budgeted income = $0 AND Shelter Expenses = $0 AP to RJ or AC to CL, for reason code **V21** (Failure to Provide Verification [Adequate]) (AP to RJ or SI to CL or AC to CL) with one of the following codes: **E30** (Deny - Excess Income), **E35** (Deny Excess Income), **E39** (Excess Income - COLA [Timely]), **M66** (Duplicate Application**)**, **M67** (Deny - Part of Another Application), **Y12** (Receiving SNAP as part of another PA case)
- Household size = 1 AND SNAP benefit <$100 AND (Budgeted earned income >$0 OR Budgeted unearned income >$0)
- Case changes – adding newborn child only [child less than 1 year old going from AP to AC status](Recertification or Re-application) AND (Shelter code 38, 40 or 02) AND Budgeted Income>$0 AND (SSA or SSI (income source code 27, 31) is the only type of income budgeted)
- New Applications with SNAP benefit > $39
- SNAP Benefit < $39
- Household Size >9
- Cases that error out in WMS
- SI to CL for reason code Y29
- Earned income >$3,000 monthly
- Reported Child Support Expenses >$100
- Budgeted earned income >$0 OR budgeted unearned income >$0
- Change Case Data - one individual goes from AC to CL status with Code **F90** (Budgeted monthly Earned Income + Budgeted monthly Unearned Income) < Monthly Household Expenses
- SNAP cases with a backup grant present.
- Dependent care expenses >$0 AND Employment income=$0.
- Case changes as a result of a Fair Hearing

<u>Selective Case Review (SCR) Summary – Summary Per Category</u>
The Summary Per Category view will have the following data elements:

- **SCR Category**
- **% Review:** Percentage of cases that would be reviewed by a Supervisor for the SCR category.
- **Effective Date:** Date that the % Review was set for the SCR category that was triggered by the case transmission to WMS.
- **Direct Xmit Cases:** Count of cases that were directly transmitted to WMS (bypassed the Supervisor Review).
- **Direct Xmit Errors:** Count of this same cohort of cases that generated at least one error.
- **Direct Xmit Error Rate:** Cases with **Direct Xmit Errors** / **Direct Xmit Cases**
- **Supervisor Review Cases:** Count of cases that were reviewed by a Supervisor.
- **Supervisor Review Errored Cases:** Count of this same cohort of cases that generated at least one error.
- **Supervisor Review Error Rate:** Cases with **Supervisor Review Errors** / **Supervisor Reviewed Cases**
- **Total Cases:** Sum of all cases transmitted to WMS regardless of Direct or Supervisor Review.
- **Total Case Errors:** Count of this same cohort of cases that generated at least one error.
- **Total Error Rate:** Percentage of errors for the SCR category.
  - **Note:** if a transmission generates multiple errors per case, this is only counted as 1 (one).
  - Blank counts will be displayed a 0 (zero)
  - Blank percentages will be displayed as – (dash)

Report retrieval:

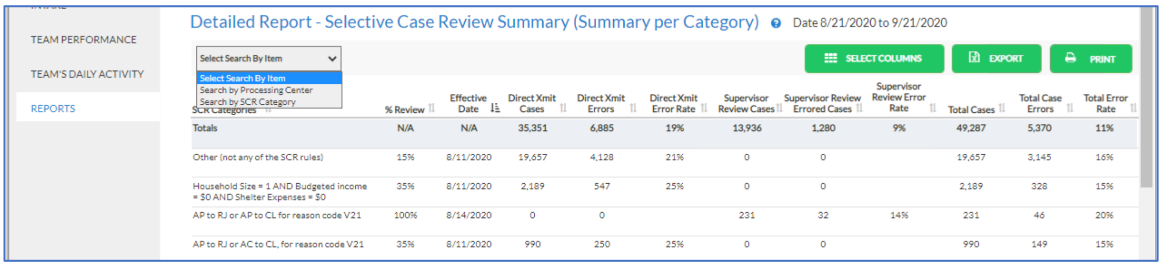
- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.

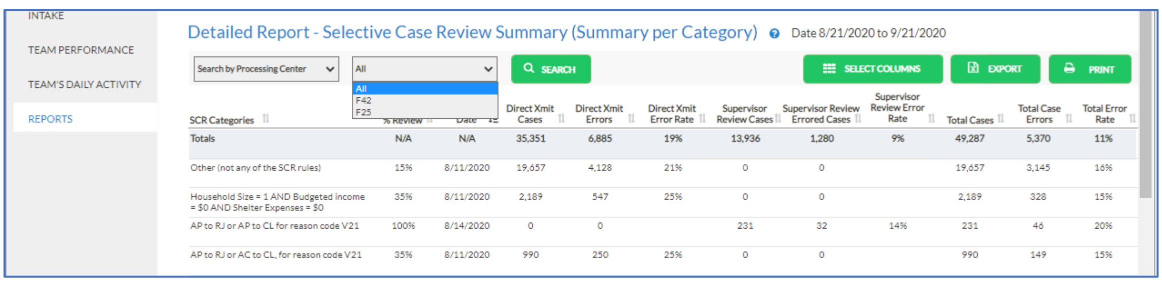


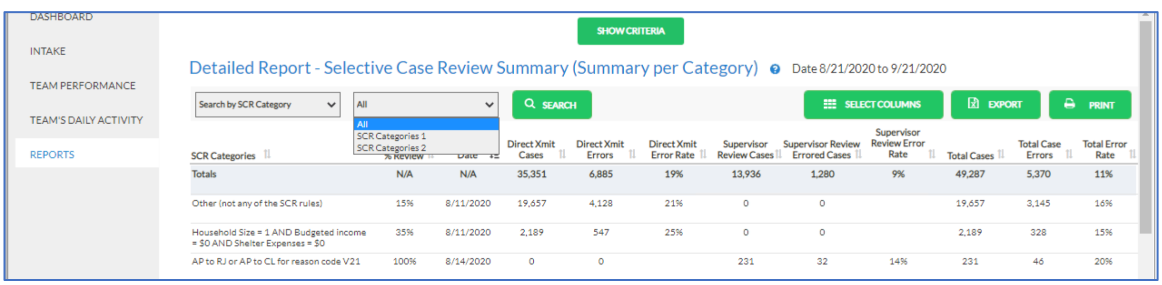
SCR Categories	% Review	Effective Date	Direct Xmit Cases	Direct Xmit Errors	Direct Xmit Error Rate	Supervisor Review Cases	Supervisor Review Errored Cases	Supervisor Review Error Rate	Total Cases	Total Case Errors	Total Error Rate
Totals	N/A	N/A	35,351	6,885	19%	13,936	1,280	9%	49,287	5,370	11%
Other (not any of the SCR rules)	15%	8/11/2020	19,657	4,128	21%	0	0		19,657	3,145	16%
Household Size = 1 AND Budgeted income = $0 AND Shelter Expenses = $0	35%	8/11/2020	2,189	547	25%	0	0		2,189	328	15%
AP to RJ or AP to CL for reason code V21	100%	8/14/2020	0	0		231	32	14%	231	46	20%
AP to RJ or AC to CL, for reason code V21	35%	8/11/2020	990	250	25%	0	0		990	149	15%
(AP to RJ or SI to CL or AC to CL) with one of the following codes: E30, E35, E39, M66, M67, Y12	35%	8/11/2020	750	143	19%	0	0		750	105	14%
Household size = 1 AND SNAP benefit <$100 AND (Budgeted earned income >$0 OR Budgeted unearned income >$0)	0%	8/11/2020	750	90	12%	0	0		750	83	11%
Case changes – adding newborn child only [child less than 1 year old going from AP to AC status]	0%	8/11/2020	450	41	9%	0	0		450	50	11%
(Recertification or Re-application) AND (Shelter code 38, 40 or 02) AND Budgeted	0%	8/11/2020	1,500	360	24%	0	0		1,500	150	10%

The manager can filter the results through the following search options:

- When **Search By Processing Center** is selected, the manager will select the processing center.
- When **Search By SCR Category** is selected, the manager will select the **SCR Category**.
- The manager will click on the **Search** button to retrieve the results.
- The manager can clear the search by clicking on the **Clear Search** button.
- The manager can print or export the output.







<u>Selective Case Review Summary – Summary Per Activity</u>

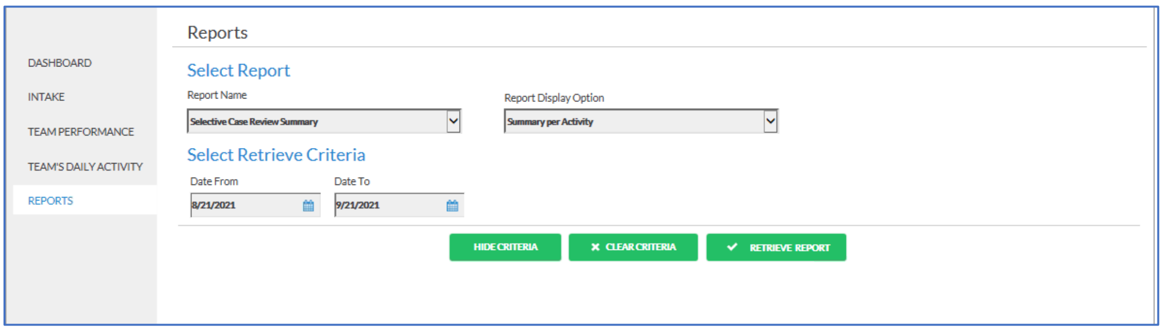
The **Summary Per Activity** view will have the following data elements:

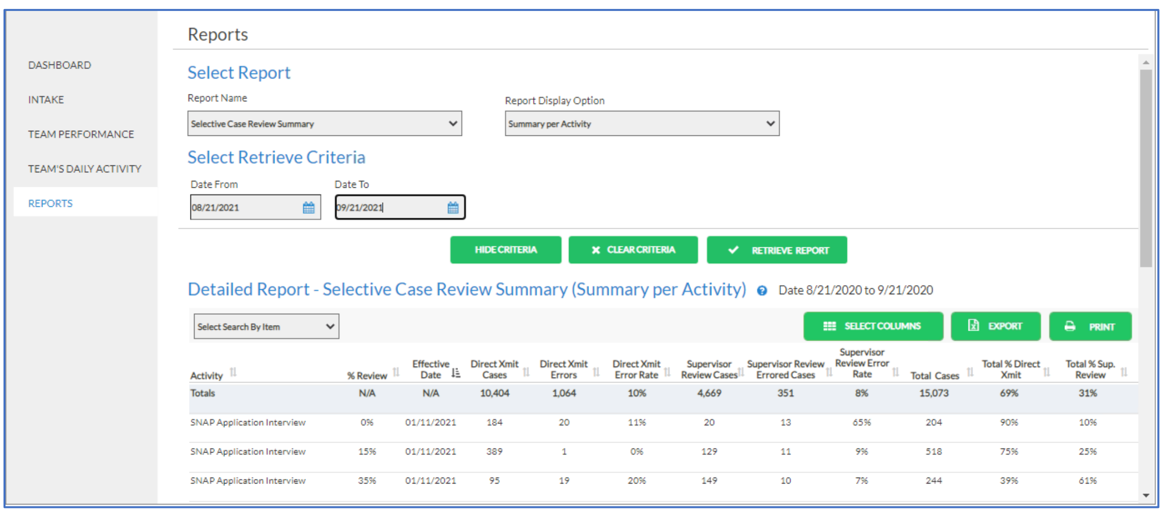
- **Activity:** The SPOS activity completed by the worker.
- **% Review**
- **Effective Date**
- **Direct Xmit Cases**
- **Direct Xmit Errors**
- **Direct Xmit Error Rate**

- **Supervisor Review Cases**
- **Supervisor Review Errored Cases**
- **Supervisor Review Error Rate**
- **Total Cases**
- **Total Case Errors**
- **Total Error Rate**

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





The manager can filter the results through the following search options:

- When **Search By Processing Center** is selected, the manager will select the processing center.
- When **Search By SCR Category** is selected, the manager will select the **SCR Category**.

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

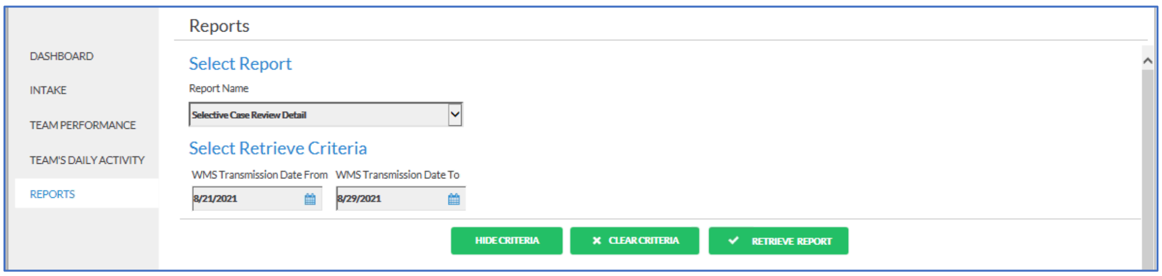
The manager can print or export the output.

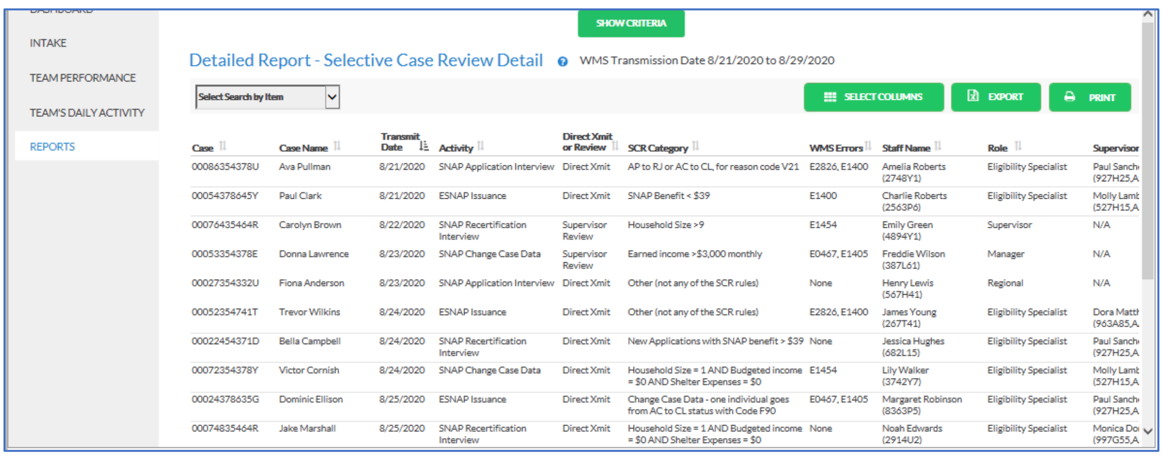
14. New Selective Case Review Detail Report

This new report will all cases transmitted to WMS for the given time period and key data elements regarding **SCR category**, **Direct Xmit**, **Errors**, **Case Information** and **Processor** details so managers can perform a detail analysis to gauge the health of the SCR program.

Report retrieval:

- The manager must select the **Date From** and **Date To** fields and click on **Retrieve Report**.





Case	Case Name	Transmit Date	Activity	Direct Xmit or Review	SCR Category	WMS Errors	Staff Name	Role	Supervisor
00086354378U	Ava Pullman	8/21/2020	SNAP Application Interview	Direct Xmit	AP to RJ or AC to CL, for reason code V21	E2826, E1400	Amelia Roberts (2748Y1)	Eligibility Specialist	Paul Sanch (927H25,A
00054378645Y	Paul Clark	8/21/2020	ESNAP Issuance	Direct Xmit	SNAP Benefit < $39	E1400	Charlie Roberts (2563P6)	Eligibility Specialist	Molly Lamb (527H15,A
00076435464R	Carolyn Brown	8/22/2020	SNAP Recertification Interview	Supervisor Review	Household Size >9	E1454	Emily Green (4894Y1)	Supervisor	N/A
00053354378E	Donna Lawrence	8/23/2020	SNAP Change Case Data	Supervisor Review	Earned income >$3,000 monthly	E0467, E1405	Freddie Wilson (387L61)	Manager	N/A
00027354332U	Fiona Anderson	8/23/2020	SNAP Application Interview	Direct Xmit	Other (not any of the SCR rules)	None	Henry Lewis (567H41)	Regional	N/A
00052354741T	Trevor Wilkins	8/24/2020	ESNAP Issuance	Direct Xmit	Other (not any of the SCR rules)	E2826, E1400	James Young (267T41)	Eligibility Specialist	Dora Matt (963A85,A
00022454371D	Bella Campbell	8/24/2020	SNAP Recertification Interview	Direct Xmit	New Applications with SNAP benefit > $39	None	Jessica Hughes (682L15)	Eligibility Specialist	Paul Sanch (927H25,A
00072354378Y	Victor Cornish	8/24/2020	SNAP Change Case Data	Direct Xmit	Household Size = 1 AND Budgeted income = $0 AND Shelter Expenses = $0	E1454	Lily Walker (3742Y7)	Eligibility Specialist	Molly Lamb (527H15,A
00024378635G	Dominic Ellison	8/25/2020	ESNAP Issuance	Direct Xmit	Change Case Data - one individual goes from AC to CL status with Code F90	E0467, E1405	Margaret Robinson (8363P5)	Eligibility Specialist	Paul Sanch (927H25,A
00074835464R	Jake Marshall	8/25/2020	SNAP Recertification Interview	Direct Xmit	Household Size = 1 AND Budgeted income = $0 AND Shelter Expenses = $0	None	Noah Edwards (2914U2)	Eligibility Specialist	Monica Do (997G55,A

The report will have the following data elements:

- Case
- Case Name
- Transmit Date
- Activity
- Direct Xmit or Review
- SCR Category
- WMS Errors

- Staff Name
- Role
- Supervisor
- Manager
- Regional

The manager can filter the results through the following search options:

- **Search by Activity**: Allows the Manager to select the SPOS activities that they want to retrieve. The options are **All** and each activity type.
- **Search by SCR Category**: Allows the Manager to select the SCR categories that they want to retrieve. The options are **All** and each SCR category type.
- **Filter by Direct Xmit / Supervisor Review:** This filter allows the Manager to refine the results based on the available options of **All**, **Direct Xmit**, or **Supervisor Review.**
- **Search by responsibility**: This filter allows the Manager to refine the results based on the available options of **Supervisor**, **Manager**, or **Regional**. Once the responsibility is selected, the Manager will be able to search for a name in this responsibility group to narrow down the results. This filter will retrieve all cases transmitted by staff in the specified organization.
- **Search by Role**: This filter allows the Manager to refine the results based on the available options of **Eligibility Specialist**, **Supervisor**, **Manager**, **Regional**, and Clerical Associate.
- **Search by Staff Name**: This filter allows the Manager to refine the results based on the name.
- **Search by WMS Error code**: This searches the **Error Code** column for an occurrence of an inputted error code.
    - **Note**: The Manager will be able to enter three or four numerical digits to perform a fuzzy search on the WMS Error code column to retrieve all rows with Error codes that match.
- **Search by Case Number**: This filter allows the Manager to refine the results based on the case number. Max of 12 characters, allow partial entries (when 12 characters are entered, first 11 characters are digits, last character is an alpha).

The manager will click on the **Search** button to retrieve the results. The manager can clear the search by clicking on the **Clear Search** button.

The manager can print or export the output.

Attachment G

Glossary Document for ANGIE

ANGIE Documentation

Table of Contents

1. Document Purpose

This document provides definitions of common definitions, terminology and concepts for the Activity and General Information Exchange (**ANGIE**).

2. ANGIE

ANGIE replaces the Classic Paperless Office System (POS) reports, queues and action menus used to assign work to Supplemental Nutrition Assistance Program (SNAP) Staff. ANGIE is a workforce management and task assignment tool.

3. User Roles and Skillsets

Staff is assigned to user roles. ANGIE support the following user roles:

- Eligibility Specialist (ES)
- Supervisor
- Manager
- Regional Manager & Business Administrator
- Reviewer

Skillsets allow SNAP business administrators to make adjustments to task assignments based on specific needs and circumstances.

For example, specific staff may be exclusively assigned to applications in order to address an increase in application submissions.

4. Tasks

Tasks represent the critical business processes for SNAP cases. A task is the highest description of work assigned, approved and processed within ANGIE and SPOS.

5. Task Statuses

The status is used to determine the progress of each task. Each task has a status as it moves through its workflow. Possible statuses include:

- **New** – Newly received applications and recertifications.
- **Interview** – Cases where the interview was started.
- **Pending** – Cases deferred for verification.
- **Ready to Assign** – Cases that are ready for assignment based on the priority and skillsets.
- **Processing** – Cases that are being processed by a Worker or pending finalization of WMS processing.
- **Supervisory** – Cases that require Supervisor or Manager approval.

- **Complete** – This is the final status for a task and indicates that the work is completed.

6. Activities

Once the task is distributed by ANGIE or started through the case search tool, the work is completed in the Streamlined Paperless Office System (SPOS). ANGIE opens SPOS for the appropriate activity based on the assignment or selection. After completing or suspending the activity in SPOS, staff returns to ANGIE for their next task.

7. Hold and Returns

ANGIE allows staff to **hold** an assigned task for a pre-determined period, by selecting a reason for the hold. This allows the staff person to return to the same task that was assigned.

ANGIE allows staff to **return** an assigned task on which they cannot work. The staff must select a valid reason from the list for the return.

Staff can also select a hold or return reason when suspending an activity in SPOS.

8. Universal Processing and Prioritization

Staff in ANGIE works from a shared common list of ready tasks, which are assigned by ANGIE based on priority dates and helps prevent backlogs. This universal processing pool of work removes the need to individually access in the queue to assess the readiness of the task.

The list is organized by priority date, ready to assign date, document status and other attributes, with the oldest tasks given the highest priority. This prioritization is based on business rules and attributes that drive the logic. Tasks are distributed by ANGIE once they are ready to assign.

9. Events

Events are components of a status. They provide a historical view of a case and task, representing steps such as starting an activity, completing of an interview, deferring for verification, starting processing, approval by a Supervisor, and other such examples.

10. Types of Events for Application

Task	Status	Event
Application	New	App Reg Access Human Resources Administration (AHRA)
Application	New	App Reg - In Center
Application	New	Assign Application

Application	New	Document Indexed
Application	New	Document Submitted
Application	Interview	Complete Interview - Deferred for Verification
Application	Interview	Complete Interview - No Deferral
Application	Interview	Document Indexed
Application	Interview	Document Submitted
Application	Interview	Started from Case Search
Application	Interview	Started from Get Next
Application	Interview	Suspend Interview
Application	Ready to Assign	Adverse Action Pause
Application	Ready to Assign	ESNAP Ready
Application	Ready to Assign	ESNAP Returned by Supervisor
Application	Ready to Assign	ESNAP Returned by WMS - Error Correction
Application	Ready to Assign	Mandated Verification Not Received by Due Date
Application	Ready to Assign	Mandated Verification Received - Full
Application	Ready to Assign	No Deferral
Application	Ready to Assign	No Interview Completed - Failed to Keep (FTK)
Application	Ready to Assign	Returned by Supervisor
Application	Ready to Assign	Returned by WMS - Error Correction
Application	Ready to Assign	Resource File Integration/Information Verification Service (RFI/IVS/SDX) Received
Application	Ready to Assign	Supervisor Review Required
Application	Pending	Deferred for RFI/IVS/SDX
Application	Pending	Deferred for RFI/IVS/SDX and Verification
Application	Pending	Deferred for Verification
Application	Pending	Document Indexed
Application	Pending	Document Submitted
Application	Processing	Assign Application
Application	Processing	Assign Eligibility Decision
Application	Processing	Assign FTK Application
Application	Processing	Complete Processing
Application	Processing	Complete RFI/IVS/SDX Review
Application	Processing	Continued to Processing
Application	Processing	Document Indexed
Application	Processing	Document Submitted
Application	Processing	ESNAP Processing
Application	Processing	ESNAP SCR - Selective Case Review
Application	Processing	Selective Case Review sent to WMS
Application	Processing	Started from Case Search
Application	Processing	Started from Get Next
Application	Processing	Suspend ESNAP Processing
Application	Processing	Suspend Processing
Application	Processing	Suspend Processing - Deferred for Verification
Application	Processing	WMS Clock Down
Application	Supervisory	Complete ESNAP Supervisor Review
Application	Supervisory	Complete Supervisor Review
Application	Supervisory	Document Indexed

Application	Supervisory	Document Submitted
Application	Supervisory	ESNAP: Ineligible
Application	Supervisory	ESNAP: Sent to WMS
Application	Supervisory	ESNAP: Single Issuance
Application	Supervisory	Sent to WMS
Application	Supervisory	Start ESNAP Supervisor Review
Application	Supervisory	Start Supervisor Review
Application	Supervisory	Started from Case Search
Application	Supervisory	Started from Get Next
Application	Supervisory	Suspend ESNAP Supervisor Review
Application	Supervisory	Suspend Supervisor Review
Application	Complete	Active
Application	Complete	Closed
Application	Complete	ESNAP: Active
Application	Complete	Forced Closed by WMS; Case Reason Code **968**
Application	Complete	Rejected
Application	Complete	Withdrawn / Purged in WMS
Application	Complete	Task Removed (Stale)

11. Types of Events for Recertification

Task	Status	Event
Recertification	New	Added to Recertification List from WMS
Recertification	New	Assign Recertification
Recertification	New	Created by Recert File
Recertification	New	Document Indexed
Recertification	New	Document Submitted
Recertification	New	Submitted via AHRA
Recertification	Interview	Complete Interview - Deferred for Verification
Recertification	Interview	Complete Interview - No Deferral
Recertification	Interview	Document Indexed
Recertification	Interview	Document Submitted
Recertification	Interview	Started from Case Search
Recertification	Interview	Started from Get Next
Recertification	Interview	Suspend Interview
Recertification	Ready to Assign	Adverse Action Pause
Recertification	Ready to Assign	Mandated Verification Not Received by Due Date
Recertification	Ready to Assign	Mandated Verification Received - Full
Recertification	Ready to Assign	No Deferral
Recertification	Ready to Assign	No Interview Completed - Manual FTK
Recertification	Ready to Assign	No Interview Completed - System FTK
Recertification	Ready to Assign	No Recert Received by Due Date - System FTK
Recertification	Ready to Assign	Returned by Supervisor
Recertification	Ready to Assign	Returned by WMS - Error Correction
Recertification	Ready to Assign	RFI/IVS Received
Recertification	Ready to Assign	Supervisor Review Required
Recertification	Pending	Deferred for RFI/IVS/SDX

Recertification	Pending	Deferred for RFI/IVS/SDX and Verification
Recertification	Pending	Deferred for Verification
Recertification	Pending	Document Indexed
Recertification	Pending	Document Submitted
Recertification	Processing	Assign Recertification
Recertification	Processing	Complete Processing
Recertification	Processing	Complete RFI/IVS/SDX Review
Recertification	Processing	Continued to Processing
Recertification	Processing	Document Indexed
Recertification	Processing	Document Submitted
Recertification	Processing	Selective Case Review sent to WMS
Recertification	Processing	Started from Case Search
Recertification	Processing	Started from Get Next
Recertification	Processing	Suspend Processing
Recertification	Processing	Suspend Processing - Deferred for Verification
Recertification	Processing	WMS Clock Down: xxx
Recertification	Supervisory	Complete Supervisor Review
Recertification	Supervisory	Document Indexed
Recertification	Supervisory	Document Submitted
Recertification	Supervisory	Sent to WMS
Recertification	Supervisory	Start Supervisor Review
Recertification	Supervisory	Started from Case Search
Recertification	Supervisory	Started from Get Next
Recertification	Supervisory	Suspend Supervisor Review
Recertification	Complete	Active
Recertification	Complete	Closed
Recertification	Complete	Forced Closed by WMS; Case Reason Code **968**
Recertification	Complete	Task Removed (Stale)

12. Types of Events for Change Case

Task	**Status**	**Event**
Change Case	Ready to Assign	Returned by Supervisor
Change Case	Ready to Assign	Returned by WMS - Error Correction
Change Case	Ready to Assign	Supervisor Review Required
Change Case	Pending	Document Indexed
Change Case	Pending	Document Submitted
Change Case	Processing	Complete Processing
Change Case	Processing	Selective Case Review sent to WMS
Change Case	Processing	Started from Case Search
Change Case	Processing	Started from Get Next
Change Case	Processing	Suspend Processing
Change Case	Processing	WMS Clock Down: xxx
Change Case	Supervisory	Complete Supervisor Review
Change Case	Supervisory	Document Indexed
Change Case	Supervisory	Document Submitted
Change Case	Supervisory	Sent to WMS

Change Case	Supervisory	Start Supervisor Review
Change Case	Supervisory	Started from Case Search
Change Case	Supervisory	Started from Get Next
Change Case	Supervisory	Suspend Supervisor Review
Change Case	Complete	Closed
Change Case	Complete	Forced Closed by WMS; Case Reason Code **968**
Change Case	Complete	Task Removed (Stale)
Change Case	Complete	Auto close; Non-Mandatory Deferrals
Change Case	Complete	Change Case added to Recert

13. Types of Events for Document Review

Task	**Status**	**Event**
Document Review	Ready to Assign	Document Indexed
Document Review	Ready to Assign	Documents received after application denial - review required
Document Review	Ready to Assign	Documents received after closing - review required
Document Review	Ready to Assign	Documents received after periodic report closing - review required
Document Review	Ready to Assign	Documents received after recertification closing - review required
Document Review	Processing	Complete Processing
Document Review	Processing	Started from Case Search
Document Review	Processing	Started from Get Next
Document Review	Complete	Added to Case Change
Document Review	Complete	Added to Fair Hearing Decision
Document Review	Complete	Added to Interim Report
Document Review	Complete	Added to Periodic Report
Document Review	Complete	Added to Recertification
Document Review	Complete	Closed
Document Review	Complete	Change Case Opened
Document Review	Complete	No Change Needed
Document Review	Complete	Task Removed (Stale)

14. Types of Events for Interim Report

Task	**Status**	**Event**
Interim Report	New	Created by state list
Interim Report	Ready to Assign	Interim Report Complete
Interim Report	Ready to Assign	Late Interim Report
Interim Report	Ready to Assign	Mandated Change Verification Not Received by Due Date
Interim Report	Ready to Assign	Mandated Change Verification Received - Full
Interim Report	Ready to Assign	Mandated Change Verification Received - Partial
Interim Report	Ready to Assign	Returned by Supervisor
Interim Report	Ready to Assign	Returned by WMS - Error Correction
Interim Report	Ready to Assign	Supervisor Review Required
Interim Report	Pending	Interim Report Incomplete: F74 Clock Down
Interim Report	Processing	Started from Case Search

Interim Report	Processing	Started from Get Next
Interim Report	Processing	Selective Case Review sent to WMS
Interim Report	Processing	Selective Case Review without WMS transmission
Interim Report	Processing	Complete Interim Report Processing
Interim Report	Processing	Complete Interim Report Processing
Interim Report	Processing	Suspend Processing
Interim Report	Processing	Suspend Processing - Deferred for Verification
Interim Report	Processing	WMS Clock Down
Interim Report	Supervisory	Started from Get Next
Interim Report	Supervisory	Start Supervisor Review
Interim Report	Supervisory	Suspend Supervisor Review
Interim Report	Supervisory	Approve Case Change
Interim Report	Supervisory	Approve EC - Case Change
Interim Report	Supervisory	Complete Supervisor Review
Interim Report	Supervisory	Sent to WMS
Interim Report	Supervisory	Started from Case Search
Interim Report	Complete	Closed
Interim Report	Complete	Complete (No WMS Transmit)
Interim Report	Complete	Forced Closed by WMS; code 968
Interim Report	Complete	Interim Report added to Recertification
Interim Report	Complete	Processed (Active Case)
Interim Report	Complete	Task Removed (Stale)

15. Types of Events for Periodic Report

Task	Status	Event
Periodic Report	New	Periodic Report Indexed
Periodic Report	Ready to Assign	ICP Web Periodic Report Complete
Periodic Report	Ready to Assign	Late Periodic Report
Periodic Report	Ready to Assign	Received via AHRA
Periodic Report	Ready to Assign	Returned by Supervisor
Periodic Report	Ready to Assign	Returned by WMS - Error Correction
Periodic Report	Ready to Assign	Supervisor Review Required
Periodic Report	Pending	Periodic Report Incomplete: WMS Clock Down
Periodic Report	Processing	Start Processing
Periodic Report	Processing	Started from Case Search
Periodic Report	Processing	Started from Get Next
Periodic Report	Processing	Suspend Processing
Periodic Report	Processing	Complete Processing
Periodic Report	Processing	Selective Case Review sent to WMS
Periodic Report	Processing	Selective Case Review without WMS transmission
Periodic Report	Supervisory	Started from Case Search
Periodic Report	Supervisory	Started from Get Next
Periodic Report	Supervisory	Start Supervisor Review
Periodic Report	Supervisory	Suspend Supervisor Review
Periodic Report	Supervisory	Complete Supervisor Review
Periodic Report	Supervisory	Sent to WMS
Periodic Report	Complete	Closed

Periodic Report	Complete	Complete / No Change (No WMS Transmit)
Periodic Report	Complete	Deferred/Pending Change Verification (SNAP Change Case)
Periodic Report	Complete	Forced Closed by WMS; code 968
Periodic Report	Complete	Periodic Report added to Recertification

Attachment H

Streamlined POS Release Notes

Version 4.2, Summer 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.2. 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. Document Objective

The objective of this document is to provide context for the Worker on the processing screens and for the Supervisor on the approval screens.

2. Application, Recertification, Change Case Data and Error Correction Activities in SPOS

The **Application**, **Recertification**, **Change Case Data** and **Error Correction** processing activities in SPOS include 7 screens:

- **Overview** – This read-only section provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts.
- **Interview** – This read-only section provides access to the interview data in a single screen. It also provides access to the editable interview sections.
- **Budget** – This section allows the Worker to calculate a new Welfare Management System (WMS) budget.
- **TAD** (Turn-Around Document) – This section allows the Worker to make updates to case and individual status information, and to select new budgets.
- **Grants** – This section allows the Worker to enter new grants.
- **Forms** – This section allows the Worker to prepare forms for the case.
- **Processor Summary** – This section allows the Worker to resolve Resource File Integration (RFI) matches and to submit the case to the Supervisor.

In the Expedited Supplemental Nutrition Assistance Program (ESNAP) activity, an additional screen named **ESNAP Eligibility Determination** appears between the **Interview** and **Budget**.

Processor flow in SNAP Application Interview, Recertification Interview and Change Case Data
The following SPOS screens appear:

- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Processor Summary

Processor flow in ESNAP Issuance
The following SPOS screens appear:

- Overview
- Interview
- ESNAP Eligibility
- Budget
- TAD
- Grants
- Forms
- Processor Summary

Processor flow in SNAP Error Correction activities
The following SPOS screens appear:

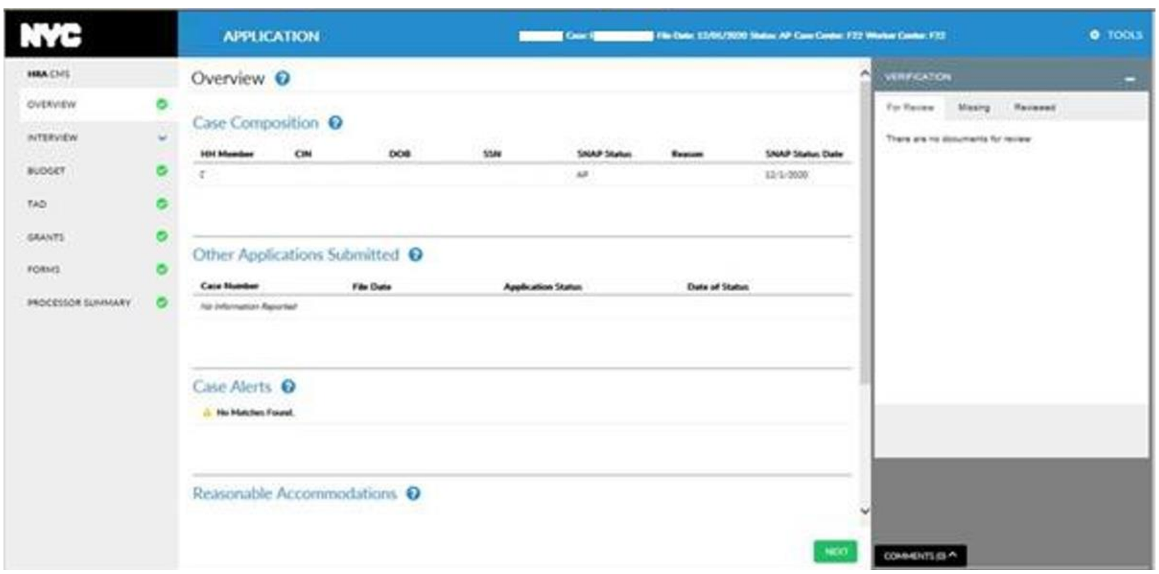
- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Processor Summary

3. Processor Section: Overview

This is the first section providing a *read-only* Overview of the case, including household members, various relevant alerts and available documentation.

The following information is displayed on this section:

- Case Composition
- Other Applications Submitted
- Case Alerts-displays alerts such as matches found
- Reasonable Accommodations
- Event log



Additional sections may appear on **Overview** depending upon the activity being opened or circumstances of the case:

- During an error correction activity, there will be an **Error Correction** section displayed on the **Overview** which shows the WMS errors.
- If the action was returned to a Worker by a supervisor, there will be a **Supervisor Return** section showing the disapprovals on the **Overview**.

Sample of Error Correction section

Error Correction

Error Number	Date of Error	Error Item number	Household Member / Line	Error Description	Additional Information
E1200	01/29/2018	145		Income source is not compatible	Income source is not compatible with SSI individual

Sample of Supervisor Return section

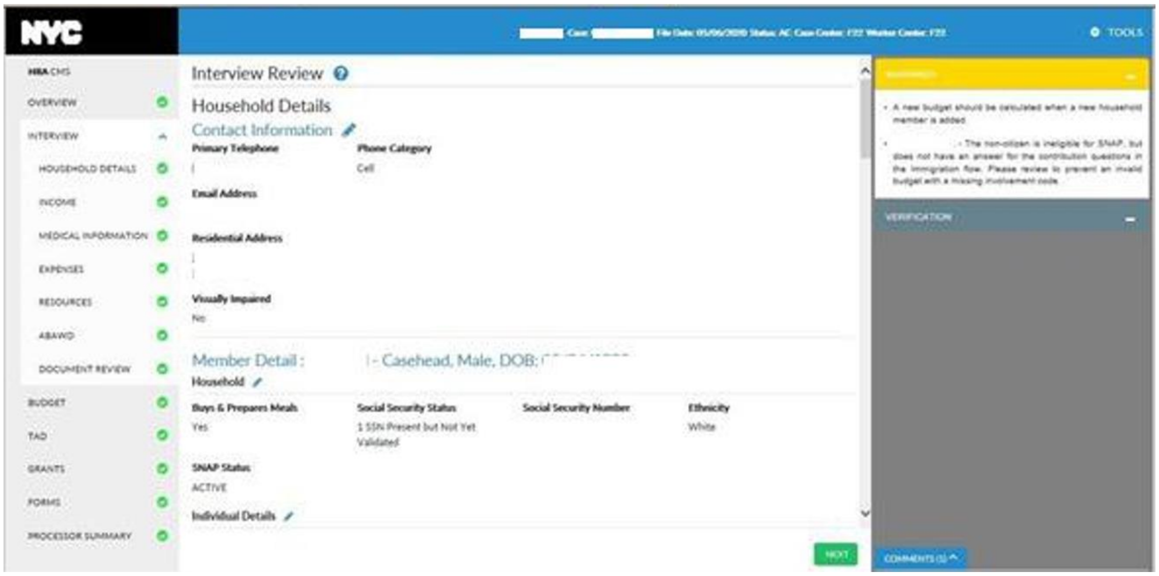
Supervisor Return

Section / Question	Household Member / Line	Supervisor / Disapproval Date	Disapproval Reason and Comment
Household Details	a / 2	[illegible] 02/15/2018	Invalid Social Security Number - Social Security Number is incorrect. Please correct as document seen in viewer.
Household Details	:/ 1	[illegible] 02/15/2018	Social Security validation is incorrect - Update Social Security to present.
Income Details	:/ 1	02/15/2018	Inaccurate working hours - Client works weekly. So please correct the working hours.

4. Processor Section: Interview Review

The **Interview Review** screen provides a read-only view of the case information on a single screen. It includes the following sections:

- **Household Details** – This section includes contact information, member details, individual details, alerts and immigration information.
- **Income** – This section includes earned income, unearned income and other income.
- **Medical Information** – This section includes disability and other medical information.
- **Expenses** – This section includes shelter, utility and other expenses.
- **Resources** – This section includes bank accounts and other types of resources.
- **Abled Bodied Adults Without Dependents (ABAWD)** – This section includes employment codes and other compliance information for able-bodied adults without dependents.
- **Document Review** – This section includes the summary of the reviews completed using the Verification Widget.



- To access the **Editable Interview**, click on a pencil icon in any main section of the **Interview Review**, such as *Household Details*. Clicking on any of the pencil icons will bring you to that section in editable interview mode.

5. Processor Section: ESNAP Eligibility Determination

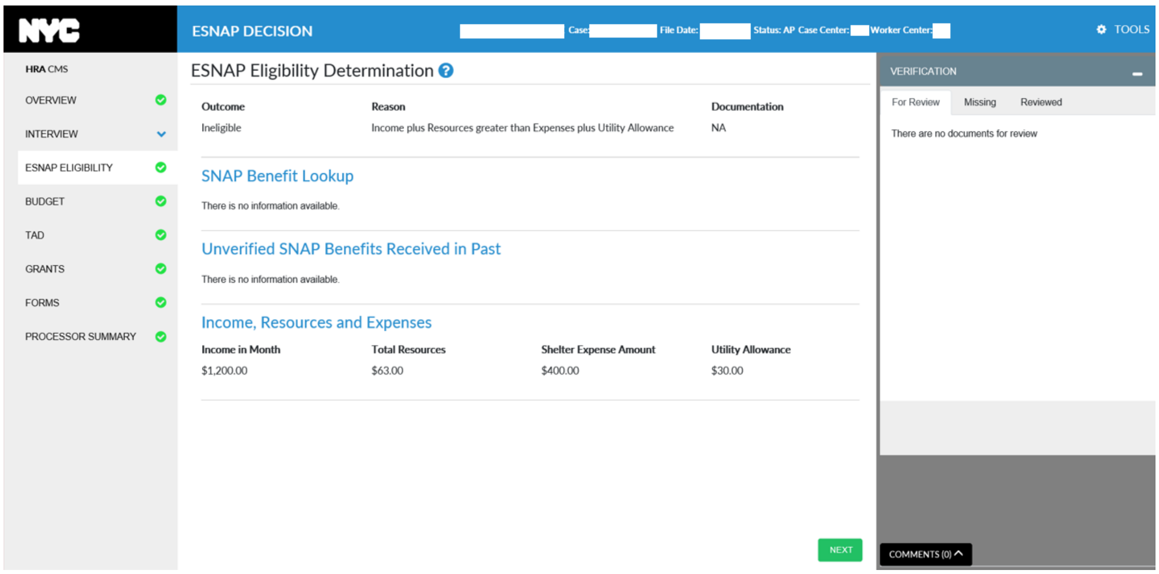
The **ESNAP Eligibility Determination** screen is the first screen displayed when the processor is taken from the **SNAP Application Interview** to the **ESNAP Issuance** activity.

SPOS runs business rules to determine the applicant's eligibility for ESNAP, based on the interview information and verification provided by the applicant, the available match data and the available WMS information.

The screen includes the following sections:

- **ESNAP Eligibility Determination** – This section includes the results of the eligibility determination, including:
  - Outcome – the possible ESNAP eligibility outcomes are Eligible, Ineligible and Unable to Issue.
  - Reason – the reason for the eligibility determination is displayed.
  - Documentation – for eligible cases, the level of documentation provided is displayed. If all documentation was provided and all Resource File Integration (RFI) were received and resolved, the field indicates Full. Otherwise, the field indicates Partial.
- **SNAP Benefit Lookup and Unverified SNAP Benefits in Past** – This section includes the results of the WMS benefit lookup for the month of application, including:
  - Benefits found in Welfare Management System (WMS).
  - Case number on which the benefits were issued, if any.
  - Whether the applicant has a special assessment situation and enter a shelter in the current month.
  - Received unverified ESNAP.
  - Date of unverified ESNAP.
  - Recurring SNAP Benefits after unverified ESNAP.
  - Recurring date

- **Income, Resources and Expenses** – This section includes the income, resources, shelter expense and utility allowance amounts used to make the ESNAP eligibility determination, if applicable:
    - Income in Month
    - Total Resources
    - Shelter Expense
    - Utility Allowance



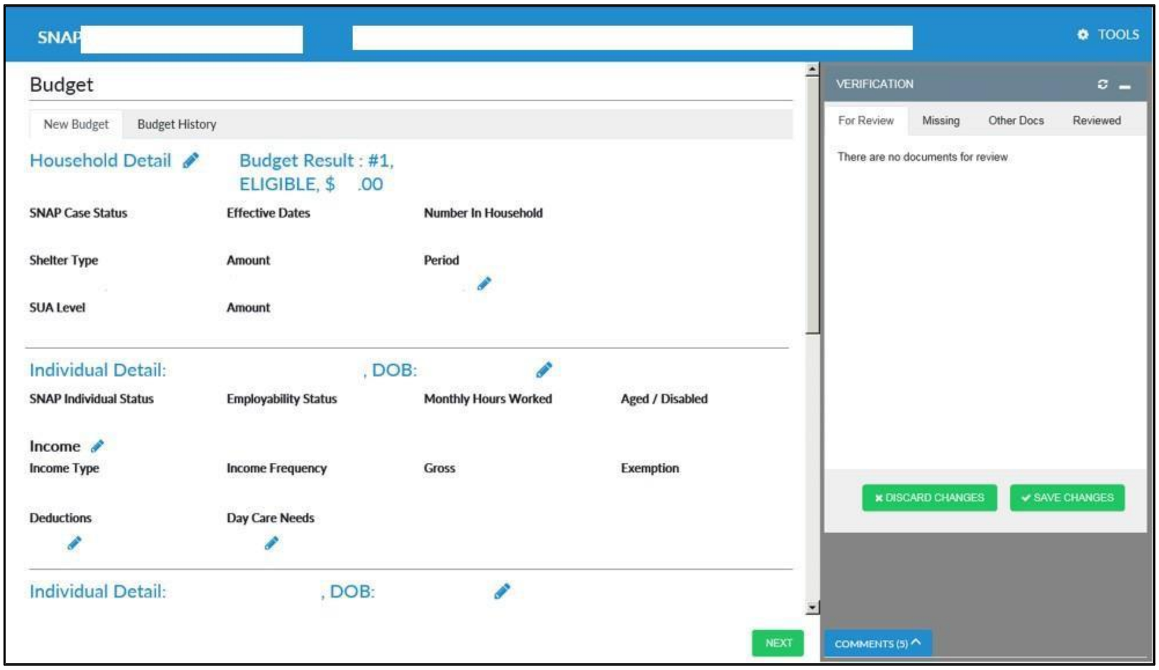
6. Processor Section: Budget

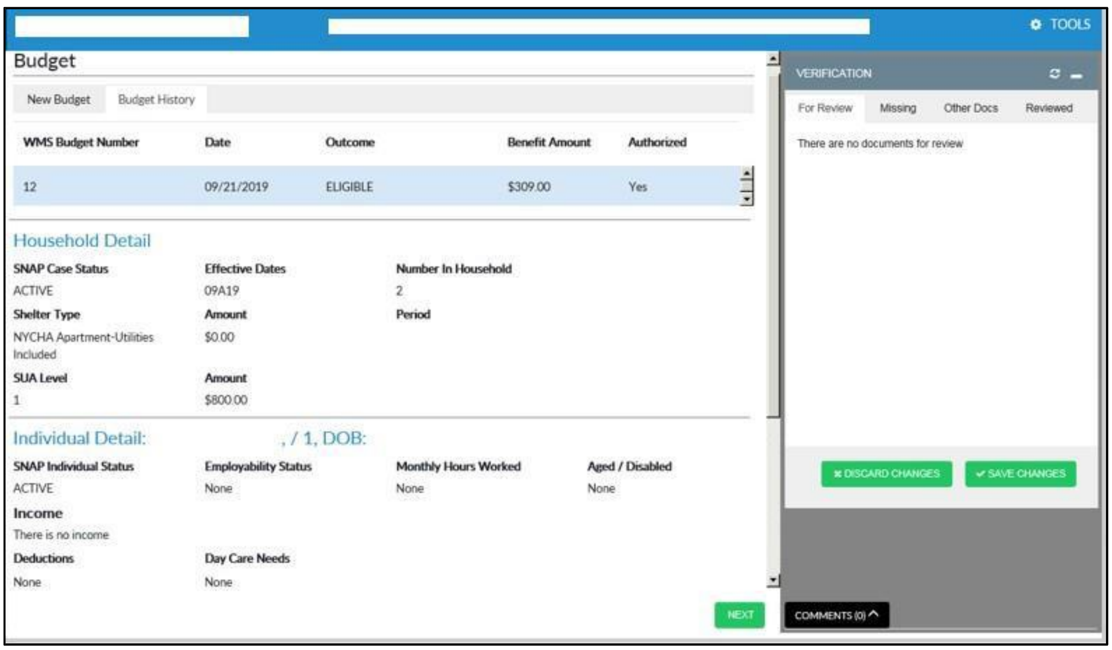
The new **Budget** screen converts the interview information into the codes required for WMS budgeting, allows calculation of the WMS budgets and allows viewing of saved WMS budgets.

The screen includes two tabs:

- New Budget
- Budget History

When there is no WMS budget saved for the case, the **New Budget** tab opens by default. Once there is at least one WMS budget saved for the case, the **Budget History** opens and the processor clicks on the **New Budget** tab when they need to calculate a new budget for the case. The **Processor** clicks the **Calculate Budget** button to start the WMS budget calculation.



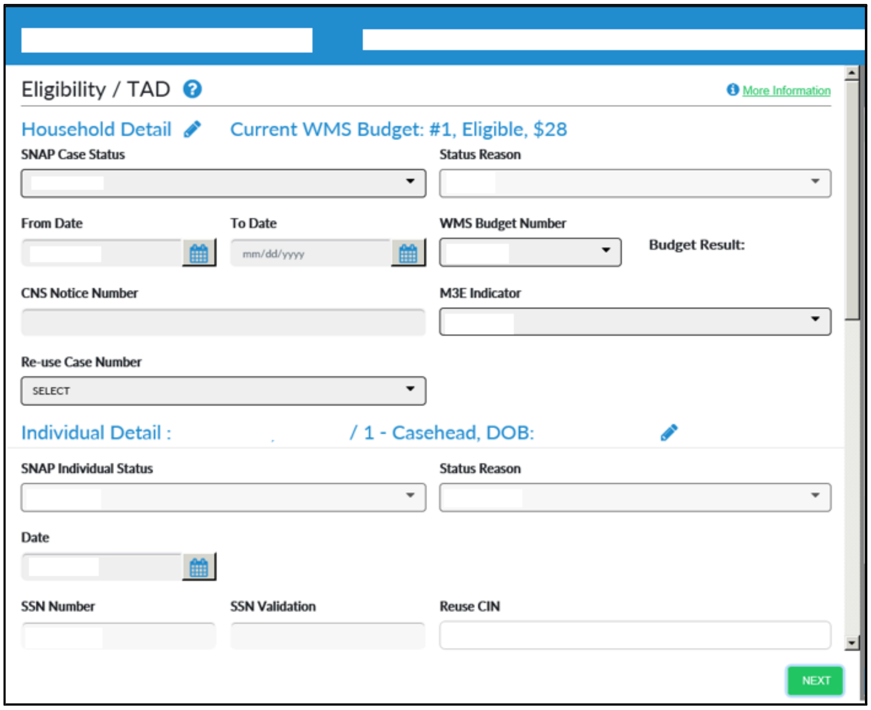


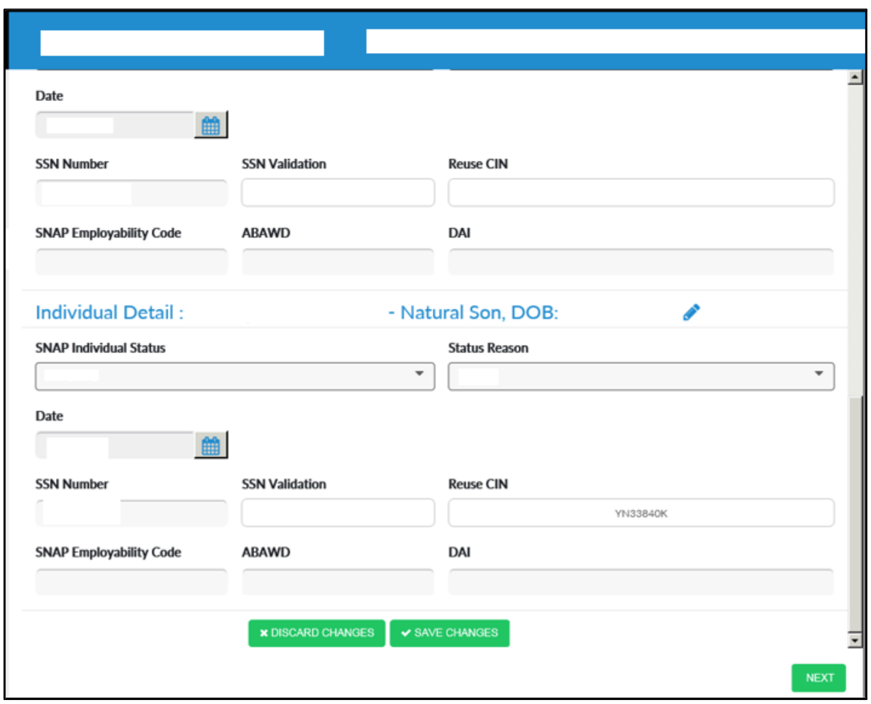
The processor can use the **Next** button to access the TAD screen or can use the navigation bar to access other areas. Edit pencil icons on the screen allow access to the editable interview screens.

7. Processor Section: TAD

The **TAD** screen allows the Processor to make the entries for the decision on the application and active cases, including selection of the statuses and reasons for the case and the individuals, entry of the Client Notice System (CNS) number, selection of the WMS budget and viewing of current WMS information.

TAD – Main Panel





The TAD screen consists of the following sections and fields:

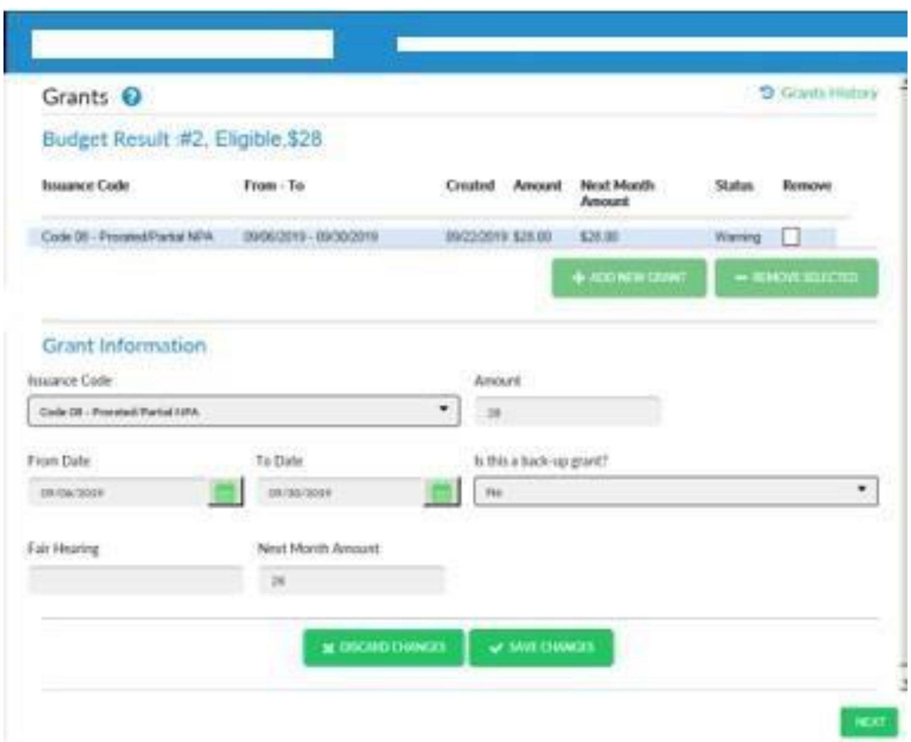
- **Current WMS Budget Header**: this header includes the current WMS budget number and result. When the budget result is eligible, it includes the SNAP benefit amount.

- **Household Detail section**
  - SNAP Case Status – this field initially displays the current WMS SNAP status for the case and allows the processor to enter a decision for the case, based on the current status.
  - Status Reason – this field is enabled when required, based on the selection made in the SNAP Case Status field.
  - From Date – this field is enabled for case rejections when required, based on the selection made in the **SNAP Case Status** field.
  - To Date – this field is enabled for case closings when required, based on the selection made in the **SNAP Case Status** field.
  - WMS Budget Number – displays a list of saved eligible WMS budgets when the case status is in Active (AC) status or is changed to Single Issue (SI) or AC (status); displays a list of saved ineligible WMS budgets when the processor selects a rejection or closing code that requires an ineligible budget.
  - Budget Result – this field displays the result of the selected WMS budget (i.e. Eligible) and an amount when the budget result is eligible and displays the reason for ineligibility if the budget result is ineligible.
  - CNS Number – this field allows the processor to enter the CNS notice number.
  - M3E Indicator – this field allows the processor to suppress the CNS notice. The possible values are: **1** (Immediate Action for Administrative Reasons), **A** (Manual Notice - Adequate Action), or **T** (Manual Notice - Timely Action).
  - Re-use Case Number – this field with the case number is reused for SNAP cases in Applying (AP) status in WMS only, if any.
- **Individual Detail Section** with the name, line number, relationship and date of birth for each individual
  - SNAP Individual Status – enabled when required.
  - Status Reason – enabled when required.
  - Date – enabled when required.
  - SSN (Social Security Number) – read-only field.
  - SSN Validation – read-only field.
  - Reuse Client Identification Number (CIN) – read-only field for individuals in Application (AP) status in WMS only.
  - SNAP Employability Code – read-only field.
  - ABAWD (Able-Bodied Adult without Dependents) – read-only field.
  - DAI (Disability Accommodation Indicator) – read-only field.
- **Buttons:**
  - Discard Changes – this button allows the processor to cancel any changes made on the TAD screen.
  - Save Changes – this button allows the processor to save changes made on the TAD screen and runs the business rules for the TAD entries made.
  - Create Notice # (Number) – the **Create Notice #** button appears when the creation of a CNS notice for the SNAP status reason selected is supported through the Office of Temporary and Disability Assistance (OTDA) CNS Write web service. Clicking on the button automatically creates the CNS notice number, which is then entered by SPOS in the CNS Notice Number field.
  - Retrieve Notice # (Number) – the Retrieve Notice # button appears when the selected SNAP status reason requires a CNS notice, but it cannot be created through the OTDA CNS Write web service. The processor must open WMS to create the CNS notice number and then return to SPOS to click on the **Retrieve** button to fetch the CNS notice number into the SPOS TAD. If the number cannot be retrieved, the Worker should copy the value from WMS and paste it into the CNS notice number field.
- **More Information –** Additional household and individual information available through the More Information link.

- **Household Detail –** includes **WMS Case Status**, **Reason** and **Dates**, Language Information, **Application** and **Recertification Source**, Continued Eligibility Determination (**CED**) and **Interview Dates For Recertification** and **Homebound Indicator**.
- **Individual Detail –** includes **Relationship**, **Date Of Birth**, **WMS Individual Status**, **Reason Code**, **Individual Date**, **Marital Status** and **Veteran Status** for each Individual on the WMS Case.

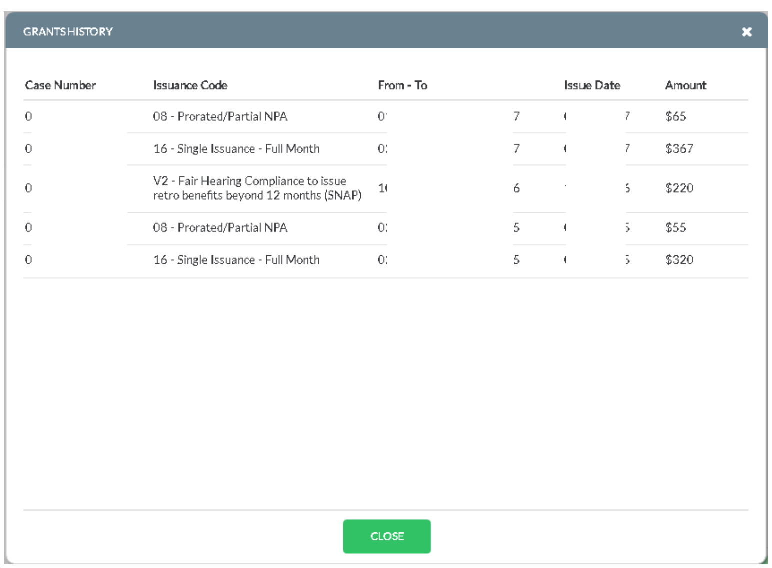
8. Processor Section: Grants

The **Grants** screen allows the processor to data entry single issue grants and view WMS grant history for the case.



The screen consists of the following section and fields:

- **Budget Result section:** Current budget number, result and amount
- **Grants Grid:**
  - Issuance Code
  - From – To
  - Created
  - Amount
  - Next Month Amount
  - Status
  - Remove
  - Add **New Grant** button to create new grants **-** The button is disabled when the case is in Rejected (RJ) or Closed (CL) status.
  - Remove **Selected** button to remove data entered grants.
- **Grant Information Section** for the selected grant in the Grants Grid:
  - Issuance Code
  - Amount
  - From date
  - To date
  - Is this a backup grant?
  - Fair Hearing
  - Next Month Amount
  - Save Changes button to save the entries and run the rules.
  - Discard Changes button to discard entries made.
- **Grant History –** The **Grant History** link opens a pop-up screen that allows the Processor to view recent SNAP benefits issued for the case, including benefits on other CA and SNAP cases with the same head of household.



ESNAP Grants

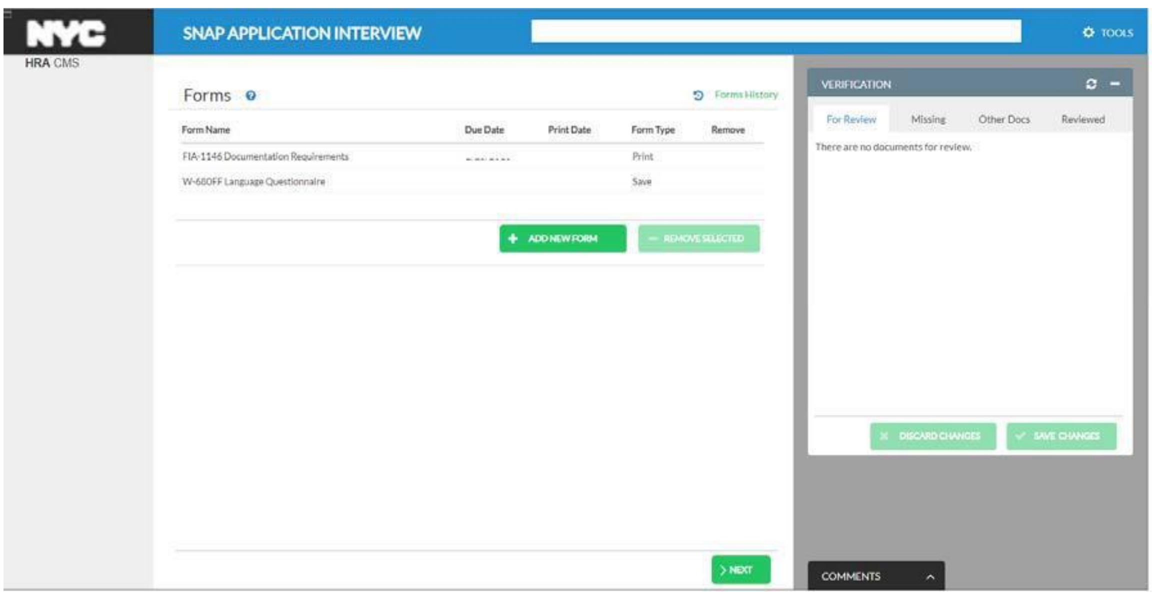
In the **ESNAP** activity, grants are automatically calculated by the system when the case is eligible for ESNAP, based on the budget authorized on the TAD.

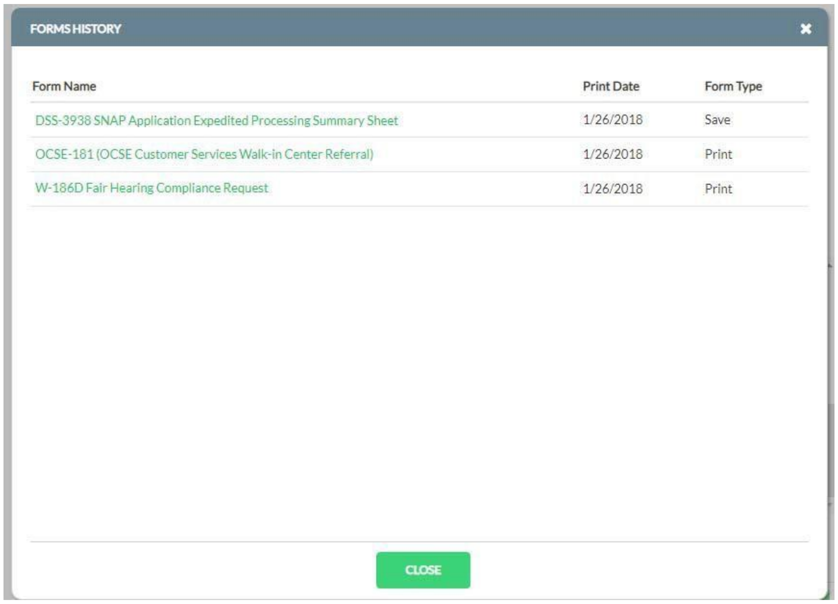
9. Processor Section: Forms

The **Forms** screen allows the **Processor** to data enter forms, select forms for printing and view form history for the case. The window has the same layout for the processor as the interviewer.

The screen contains the following sections:

- Form History – The processor can review forms printed in previous activities by clicking on the **Form History** link at the top of the window.
  - The **Form History** window opens with the list of printed forms.
  - Forms that can be reviewed appear with a green font indicating that the link can be clicked. The interviewer can click on the form name to open and review the form.
- Grid of selected forms
  - The processor can select a form by clicking on the **Add New Form** button in the **Forms Grid** and selecting the form in the **Form drop-down** menu.
  - The processor can remove a form by selecting it in the **Forms Grid**, checking the **Remove** checkbox and clicking on the **Remove Selected** button.
- Form Detail – A drop-down menu to select the form type.
  - **Household Member Menu**, if the form can be printed for individuals on the case.
  - **Detailed Data Entry** section, if additional details must be entered for the form.
- Buttons

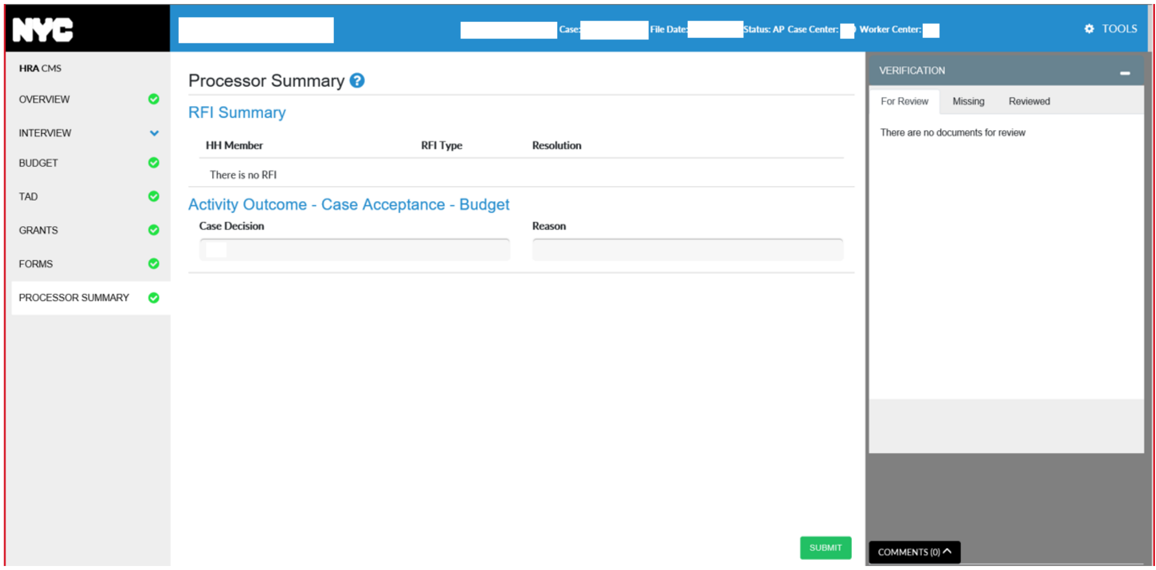


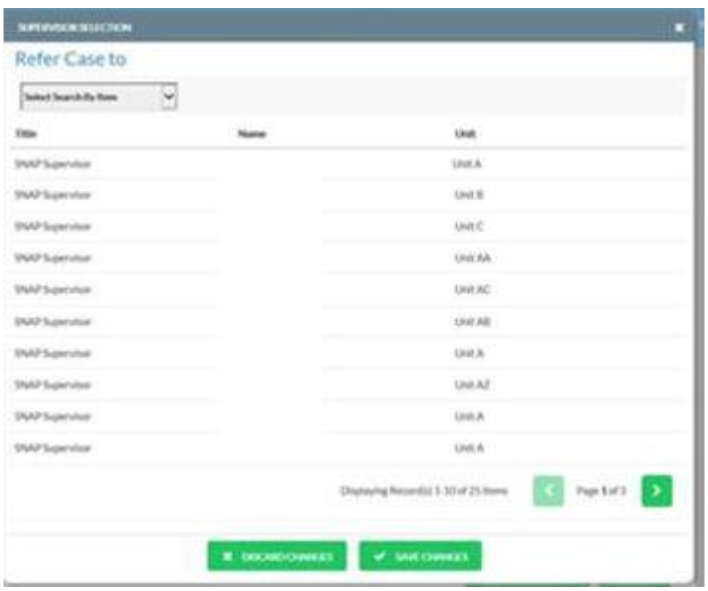


10. Processor Section: Processor Summary

The **Processor Summary** screen allows the **Processor** to view and resolve Resource File Integration (RFI) matches, view the outcome of the case action, and submission of the case action to the Supervisor:

- **RFI Summary** – The **RFI Summary** section includes a list of resolved and unresolved RFI matches, with the Household Member (HH Member), **RFI** type and resolution options listed.
    - For resolved RFI matches, the **Resolution** field displays the selected resolution code in WMS.
    - For unresolved RFI matches, the **Processor** must select the resolution in the **Select drop-down** menu, in accordance with the case decision and click on the **POST RESOLUTION** button. This posts the resolution code(s) to WMS.
- **Activity Outcome** – The **Activity Outcome** section lists the decision for the case (**Case Acceptanc**e, **Case Denial**), the **Budget Number**, **Result** and **Amount** (if eligible). It also listed the **Case Decision** (case status selected on the TAD) and the **Reason** (case status reason selected on the TAD).
    - For the **SNAP Change Case Data** activity, the **Processor** must also select whether the case includes changes or does not include changes.
- **Submit button** – Processors must click the **Submit** button (on the bottom right-side corner of the **Processor Summary** screen), to access the **Supervisor Selection** dialog box to submit the case to their Supervisor.
    - The Worker's assigned Supervisor in POS enrollment is pre-selected as the default option but the Worker can change the selection and choose another supervisor.
    - Once a Supervisor is selected, click on **Save Changes** to send the case to the Supervisor’s queue.





11. Supervisor Approval in SPOS

The **Application**, **Recertification**, **Change Case Data** and **Error Correction Approval** activities open for the Supervisor from their queue or **Action Menu** once the Worker completes the activity.

Supervisors have a customized view and flow in SPOS:

- **Overview** screen for a quick case overview.
- **Interview Details** in the **Interview Review** screens.
- Integration and approval of ESNAP determination
- Streamlining of budget review, with access to budget details and budget history from a single screen.
- Streamlining of TAD.

- Streamlining of grant approval and access to **Grant Data Entry** details and history from a single screen.
- Processing of print-to-mail forms, return of activities to the processor and transmission to WMS.

The approval activity includes the following screens:

- **Overview** – This read-only screen provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts. There is no approval required in this section.
- **Interview** – This section provides access to the **Interview Data** in a single screen. The Supervisor must approve or disapprove each section.
- **ESNAP Eligibility Determination –** This screen only appears in the **ESNAP Approval** activity to allow the Supervisor to approve or disapprove the ESNAP decision.
- **Budget** – This screen allows the Supervisor to approve or disapprove the WMS budget.
- **TAD** – This screen allows the Supervisor to approve or disapprove updates to case and individual status information.
- **Grants** – This screen allows the Supervisor to review, and approve or disapprove new grants. The Supervisor must approve or disapprove each grant in the **Grants** screen, if any were recorded. The checkmark allows the Supervisor to approve each grant. No approval is required when there are no new grants.
- **Forms** – This screen allows the Supervisor to review, and approve or disapprove the forms for the case.
- **Supervisor Summary** – This screen allows the Supervisor to approve or disapprove the **RFI** summary, complete the activity and transmit to WMS or to return the case to the Worker for resolution of any disapproved sections.
    - The **Disapproval Outcome** section provides a summary of the disapprovals entered during the **Approval** activity, if any. It includes the **Disapproved** section or question, the household member and line for the disapproved element, the Supervisor name and date, and the disapproval reason(s) and comment(s) entered.

Flow in Application, Recertification and Change Case Data approval activities
The following SPOS screens appear:

- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Supervisor Summary

Flow in ESNAP approval
The following SPOS screens appear:

- Overview
- Interview
- ESNAP Eligibility
- Budget
- TAD
- Grants
- Forms
- Supervisor Summary

Flow in Error Correction approval activities
The following SPOS screens appear:

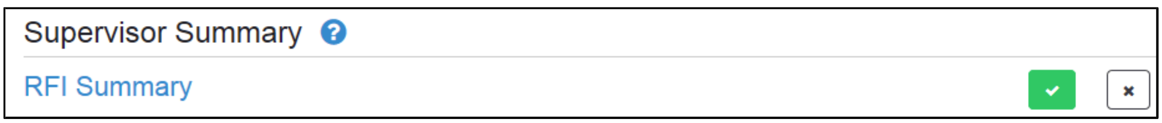
- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Supervisor Summary

12. Approving and Disapproving Eligibility Factors

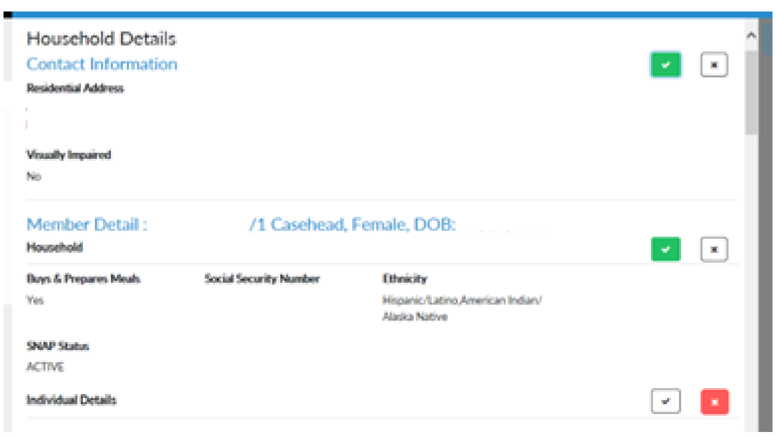
For each eligibility factor in the Interview, **ESNAP Eligibility**, **Budge**t, **TAD**, **Grants and Summary** screens, an approval and disapproval mechanism appears:

- The checkmark allows the Supervisor to approve the eligibility factor.
- The “X” allows the Supervisor to disapprove the eligibility factor.

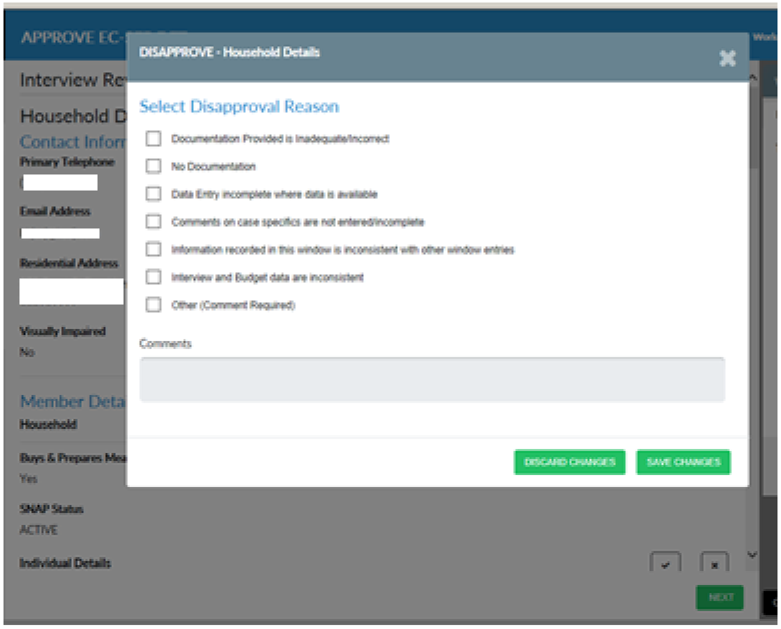
Approval/Disapproval example: RFI Summary



- If disapproving, click the **X** icon and a **Popup** window opens where the Supervisor can select one or more disapproval reasons and also enter a comment. Continue to approve or disapprove each remaining section on the **Interview Review** screen and on the subsequent screens.

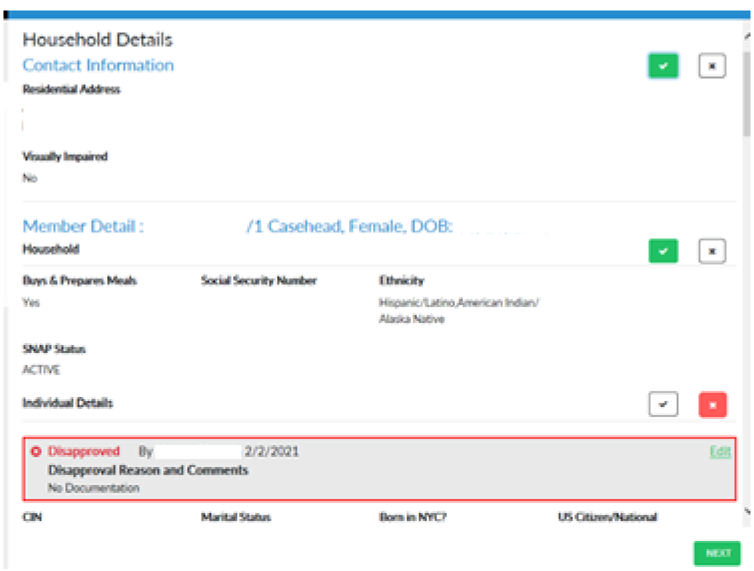


The **Disapproval Reasons Popup** window appears as shown below.



- The supervisor can select one or more of the disapproval reasons presented. If **Other (Comment Required)** is checked, then a comment is required. Press **Save Changes**.

The disapproval reasons will show in a red box for the section that was disapproved as shown here:

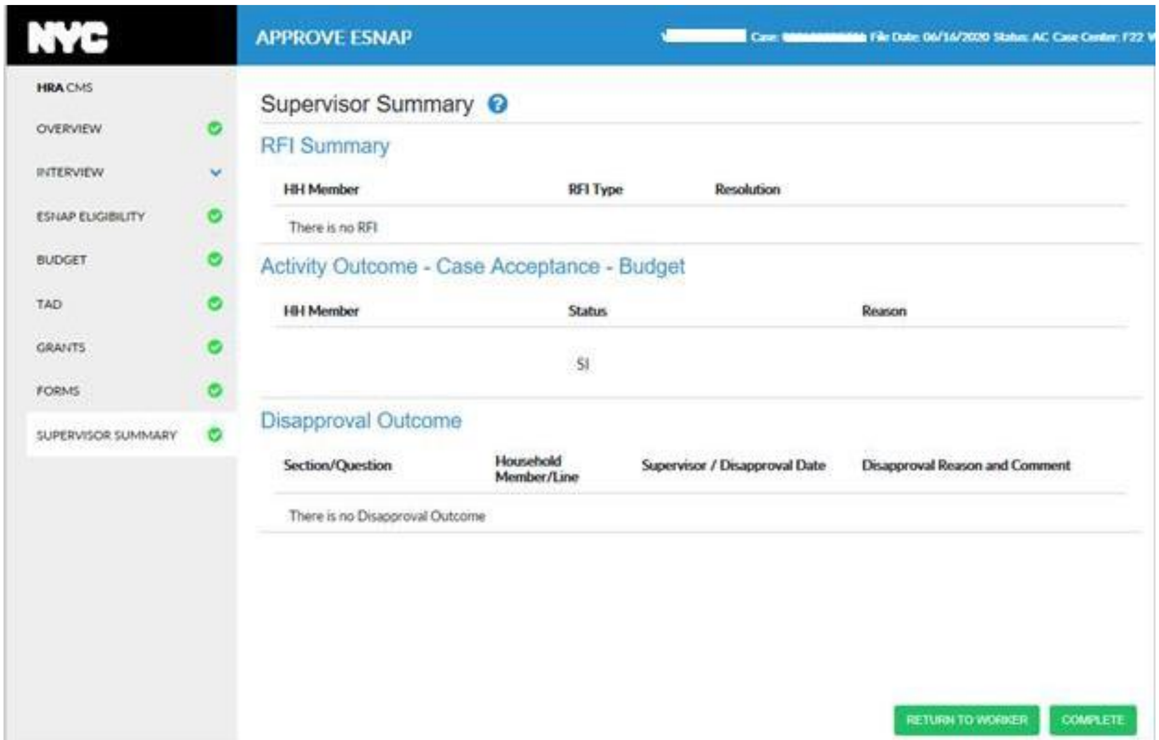


13. Completing the Approval Activities

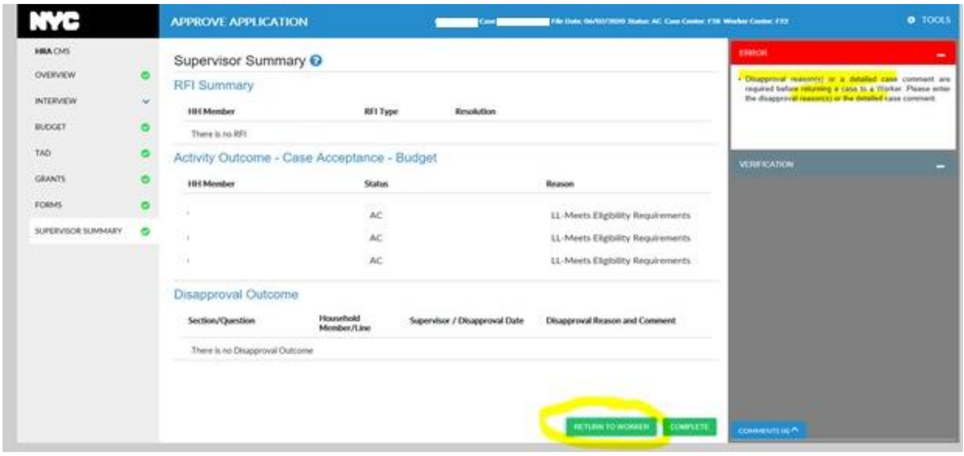
Supervisors complete their approval from the **Supervisor Summary** screen:

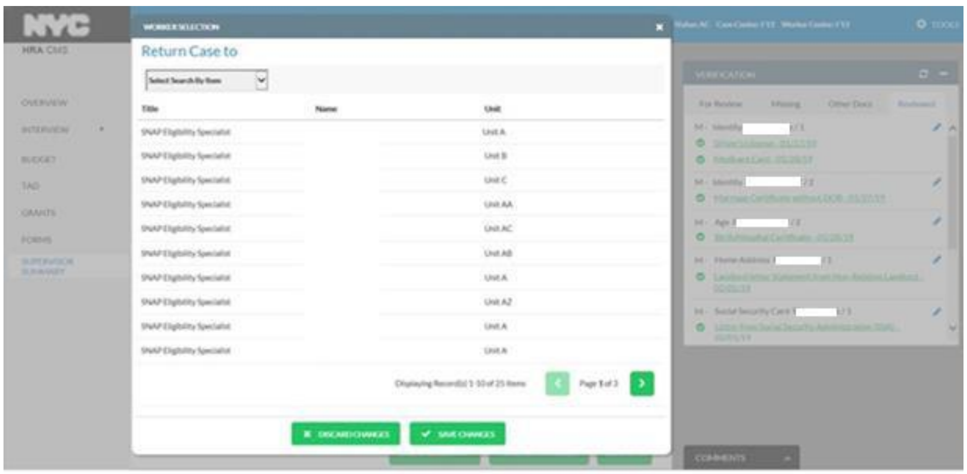
- **Complete button**: The **Complete** button appears at the bottom right-side corner of the **Supervisor Summary** screen for the Supervisor to complete an action and send a transaction to WMS when needed.

- When there are changes that must be transmitted to WMS, SPOS will send the TAD from the Supervisor's activity when the **Complete** button is clicked:
  - **Eligibility** – A TAD transmission to WMS for a case that is in AP status in WMS can be sent to the State for processing eligibility determinations. Transmission of Eligibility Transactions to WMS for their ongoing benefits include **SNAP Application Interview**, **ESNAP issuance**, **Error correction** activities and their corresponding Supervisor approval activities.
  - **Undercare –** A TAD Transmission to WMS for a case that is in SI, AC or CL status in WMS for an Undercare determination can be sent to the State for processing. Supervisors can submit a TAD from SPOS to WMS for a case in AC status in WMS without changes to the SNAP case status and the Undercare determination for a new budget. Selected.address changes and individual changes can be sent to the State for processing.
  - **Grants –** New grants can be submitted to WMS.



- **Return to Worker button**: The **Return to Worker** button appears at the bottom of the **Supervisor Summary** screen to return the case to a Worker for revisions:
  - At least one eligibility factor must be disapproved to return the action to the Worker.
  - When **Return to Worker** is clicked, a dialog box listing the Workers opens.
  - The Worker who sent the case is selected by default, but the Supervisor has the option to choose another Worker, Supervisors may search for Workers by title, name, or unit.
  - The Supervisor clicks **Save Changes** after selecting a Worker and the case is sent back to the Worker.


NYC
APPROVE APPLICATION
TOOLS
HRA CMS
OVERVIEW
INTERVIEW
BUDGET
TAD
GRANTS
FORMS
SUPERVISOR SUMMARY
Supervisor Summary
RFI Summary
HH Member
RFI Type
Resolution
There is no RFI
Activity Outcome - Case Acceptance - Budget
HH Member
Status
Reason
AC
LL-Meets Eligibility Requirements
Disapproval Outcome
Section/Question
Household Member/Line
Supervisor / Disapproval Date
Disapproval Reason and Comment
There is no Disapproval Outcome
RETURN TO WORKER
COMPLETE
ERROR
VERIFICATION


NYC
WORKER SELECTION
Return Case to
Title
Name
Unit
SNAP Eligibility Specialist
DISCARD CHANGES
SAVE CHANGES
VERIFICATION
COMMENTS

Attachment I

Streamlined POS Release Notes

Version 4.2, Summer 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.2. These and prior Release Notes also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

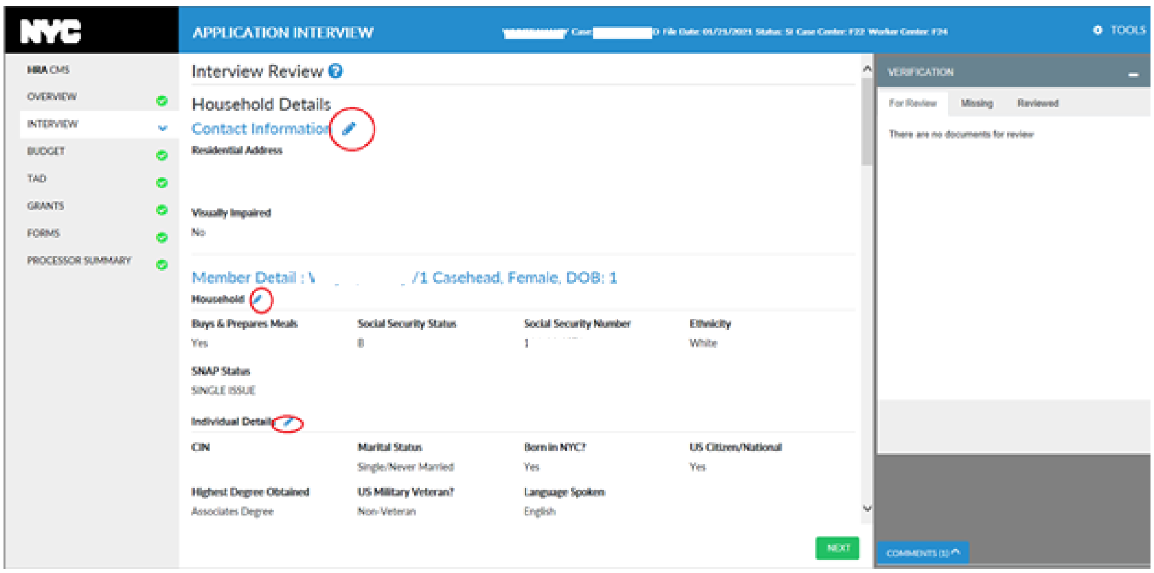
Table of Contents

1. Document Objective

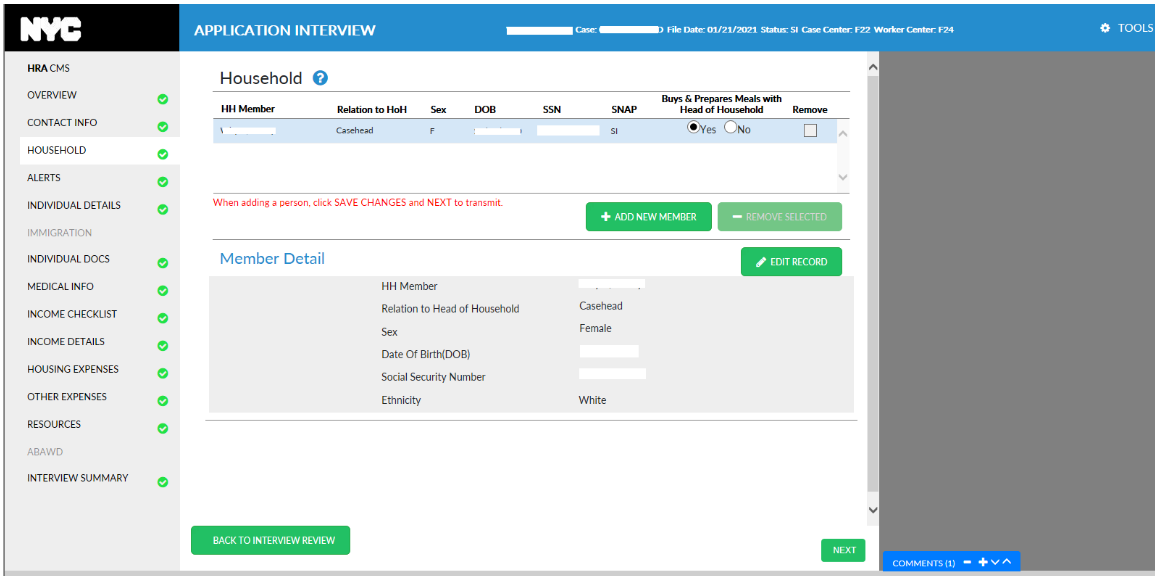
The objective of this document is to provide context for the Worker within Streamlined POS on how to access and use the editable interview screens to make changes on the case.

2. Editable Interview Access from Interview Review screen

- To access the editable interview, click on a pencil icon in any main section of the **Interview Review**, such as for example **Household Details**.



- Clicking on any of the pencil icons will bring you to that section in **Editable Interview** mode. Example clicking the pencil next to Household brings you into editable interview mode onto the **Household** screen.



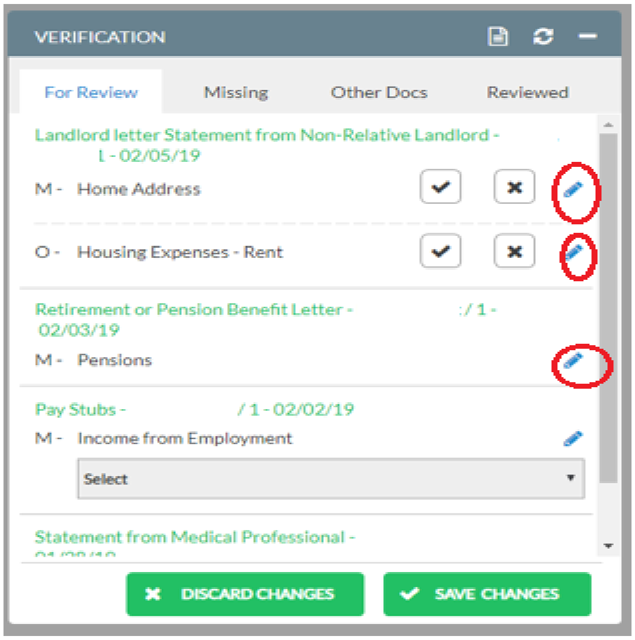
Reminder

- If making updates on the **Household** screen, click the **Edit Record** button. When the details open, click **Save Changes** when done updating information. Click **Next** to transmit to the Welfare Management System (WMS) when adding an individual to an application or active case, changing the address for an application case or when completing demographic changes on an application case. Click the **Back to Interview Review** button to return to processor mode.

3. Editable Interview Access from the Verification Widget

The **Editable Interview** can also be accessed through the pencil icons that are available throughout the **Verification** widget. The pencil icon is context-sensitive and will take you to the respective section/question where that document would be applicable.

For details on using the verification widget see Streamline POS 3.2 Release notes: https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff&CategoryId=31&VersionDate=5%2f31%2f2019+3%3a45%3a07+PM&FileType=pdf



4. Editable Interview Sections

The sections that appear in the **Editable Interview** mode are as follows:

- Overview
- Contact Info
- Household
- Alerts
- Individual Details
- Immigration (only enables when there are non-citizens on the case)
- Individual Docs
- Medical Information
- Income Checklist
- Income Details
- Housing Expenses
- Other Expenses
- Resources
- Able-Bodied Adults Without Dependents (ABAWD) (at the time of publication, this screen is disabled due to statewide waiver)
- Interview Summary

5. Screen Layout

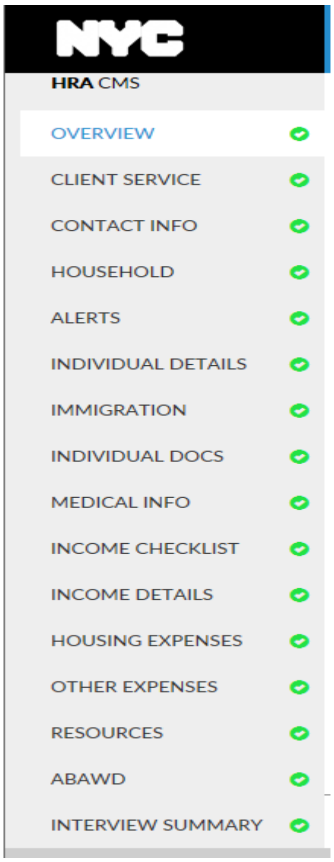
The screen layout in **Editable Interview** mode is similar to what you see in the processor mode. The blue header bar across the top is the same, the **Tools** menu is also the same. Context sensitive help is also available in the **Editable Interview** mode by clicking on the **Blue Question Mark** icons.

The 3 primary sections of the screen are:

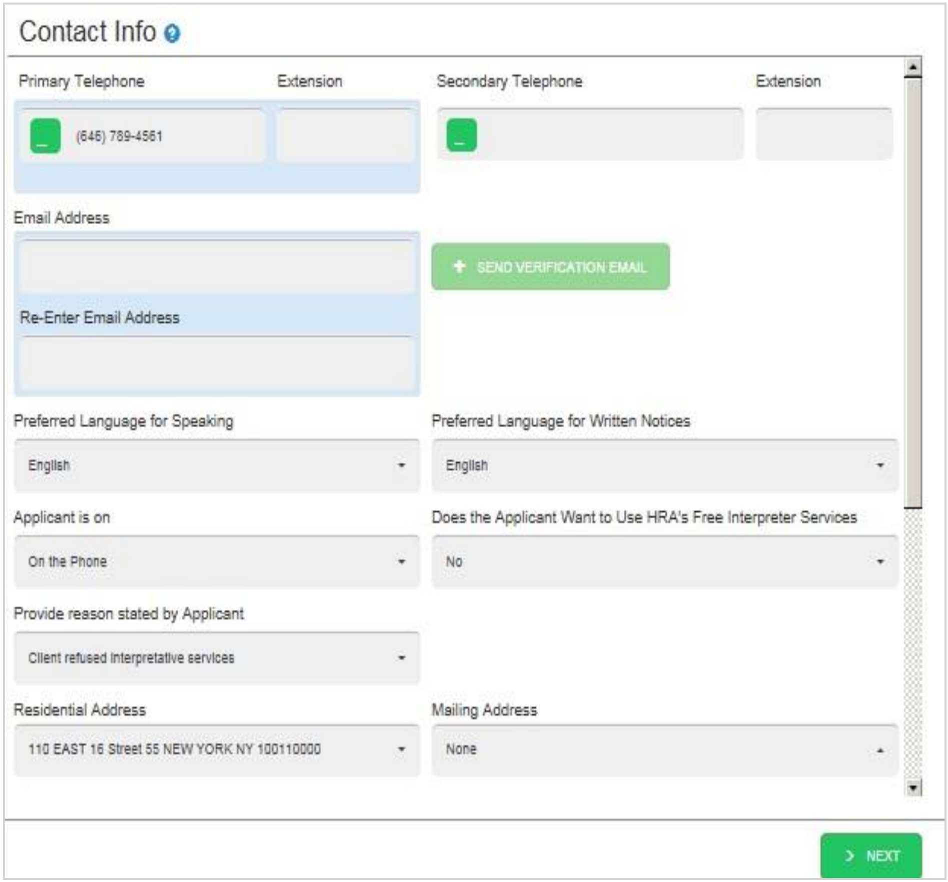
- **Navigation** bar on the left side, which now expands to the full interview sections.
- **Main Data Entry** section in the center, where the Worker will make updates or add information.

- **Right Side Panel**, where **Warnings, Error Messages**, **Informational Alerts**, and the **Comments** widget reside. Depending upon the data fields being edited or entered, a detail entry panel may also open on this right side area.

Navigation Bar
In the editable interview mode, the Navigation Bar allows the user to go directly to the desired interview sections.

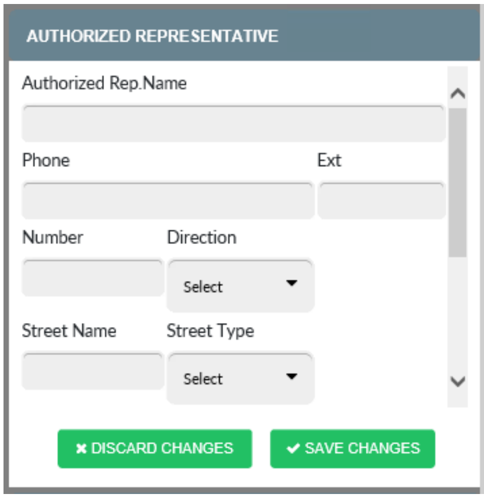


Main Data Entry
This center panel is where the user types in information.



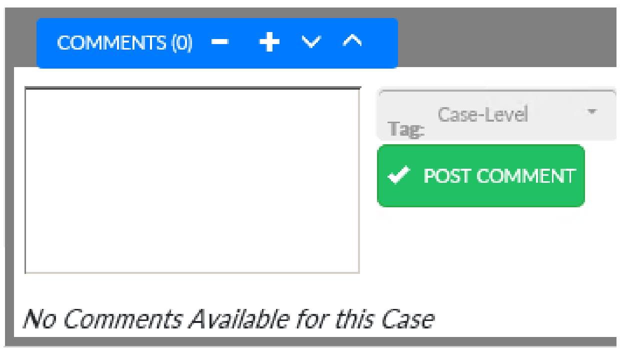
Right Side Panel
This panel displays alerts, warnings and errors for **Interview** sections. The right-side panel can also open detail entry panels for certain fields – for example, residential address, or mailing address. The right-side panel also may show clearances or matches depending upon the section of the Interview the user is currently in. At the bottom right is the **Comments** widget.

Sample Detail Entry Panel
The information displayed in this panel is triggered by an entry in the Interview. For example, in the **Contact Info** section, if **Enter/Edit** is selected in the **Authorized Representative** field then the **Detail Entry Panel** will open on the right side of the display area.

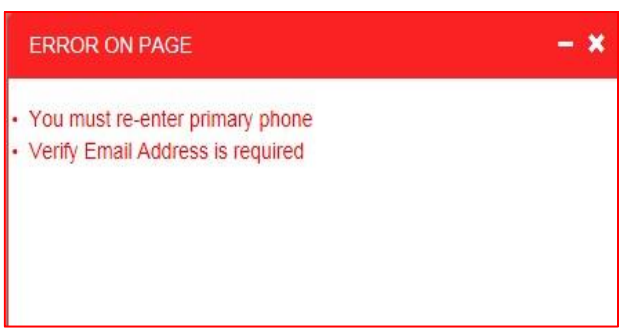


Comments

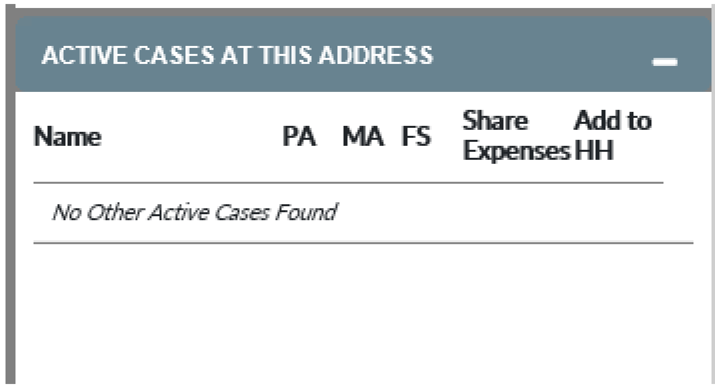
This panel is displayed in each section as a tab on the bottom right side of the screen. All comments for the case are entered in this panel.



Sample error message



Sample of WMS clearance



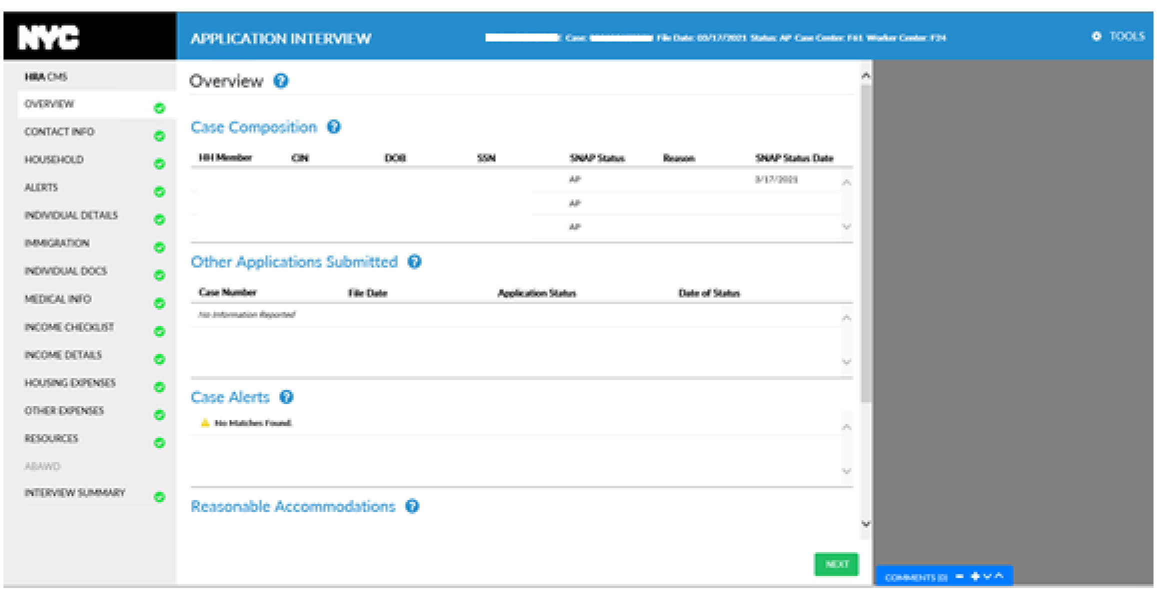
6. Section: Overview

This is the first section providing a *read-only* Overview of the case, including household members, various relevant alerts and available documentation.

The following information is displayed on this section:

- Case Composition
- Other Applications Submitted
- Case Alerts-displays alerts such as matches found
- Reasonable Accommodations
- Event log

Note: Other sections may appear in **Overview** depending upon the activity being opened or circumstances of the case. For example, if doing an error correction activity, there will be an **Error Correction** section displayed in the **Overview** which shows the WMS errors. If the action was returned to a Worker by a Supervisor, there will be a **Supervisor Return** section showing the disapprovals in the **Overview**.



Sample of Error Correction section

Error Correction

Error Number	Date of Error	Error Item number	Household Member / Line	Error Description	Additional Information
E1200	01/29/2018	145		Income source is not compatible	Income source is not compatible with SSI individual

For more details on Error correction data shown in the editable interview mode please see Streamline POS 3.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff&CategoryId=31&VersionDate=5%2f31%2f2019+3%3a45%3a07+PM&FileType=pdf

Sample of Supervisor Return section

Supervisor Return

Section / Question	Household Member / Line	Supervisor / Disapproval Date	Disapproval Reason and Comment
Household Details	a / 2	02/15/2018	Invalid Social Security Number - Social Security Number is incorrect. Please correct as document seen in viewer.
Household Details	:/ 1	02/15/2018	Social Security validation is incorrect - Update Social Security to present.
Income Details	:/ 1	02/15/2018	Inaccurate working hours - Client works weekly. So please correct the working hours.

For more details on Supervisor Return data shown in the editable interview mode please see Streamline POS 3.2 release notes:

https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff&CategoryId=31&VersionDate=5%2f31%2f2019+3%3a45%3a07+PM&FileType=pdf

7. Section: Contact Info

The **Contact Info** screen contains the applicant/participant's contact information. The information in these fields can be edited by clicking into the text fields.

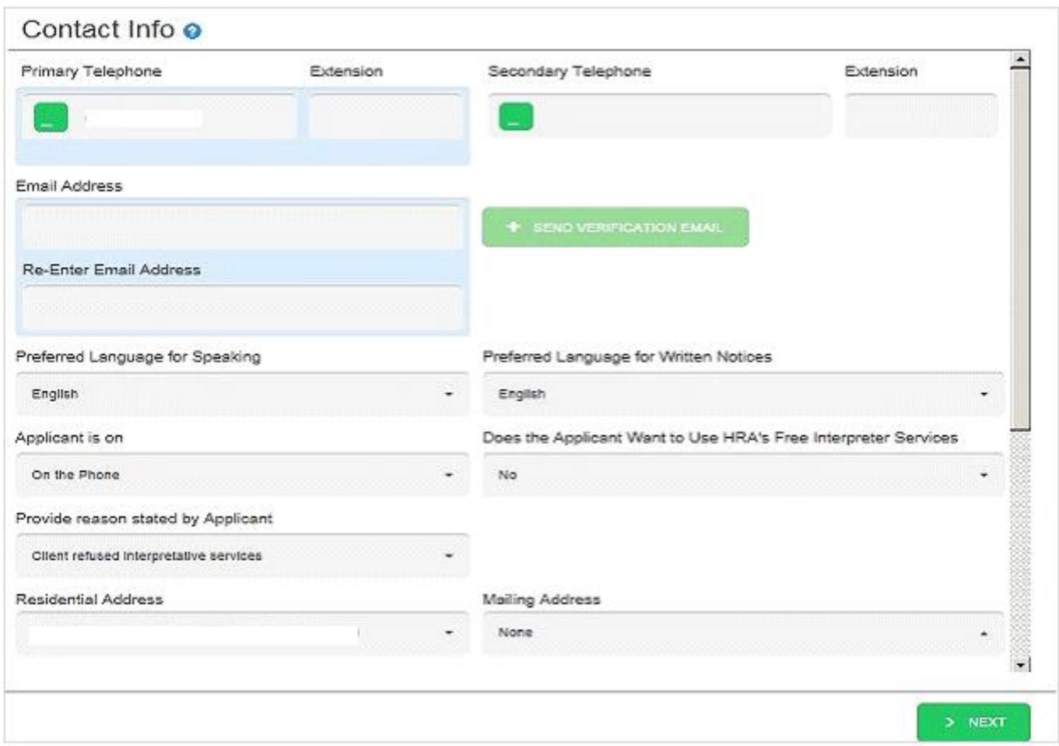
- Click the **Save Changes** button when finished when making the following edits:

- **Active Cases at this Address** panel on the right shows WMS address lookup results, if any active cases are found at this address**.**
- **Error on page** message panel on right appears if required fields have been missed.
- **Detail entry** panels on the right appear if editing or entering a residential address, mailing address, or authorized representative information.

The following information is displayed/can be edited in this section:

- Primary and Secondary Telephone
- Email Address
- Preferred Language for Speaking and Written Notices

- Do you prefer to go by a name other than your legal name?
- Do you have preferred title?
- What pronoun would you like us to use for you?
- Applicant is on- Location of applicant/participant during interview
- Does the Applicant want HRA's Free Interpreter Services?
- Provide reason stated by Applicant/Participant – refusal reasons for HRA's Free Interpreter Services
- Residential and/or Mailing Addresses
- Advocate Address
- Authorized Representative
- Enrolled in Paperless Notices – pre-filled via Access New York City (ANYC)
- Block Access to this Case in ANYC - pre-filled via ANYC
- Blind or seriously visually impaired – checkbox, if checked will open the **Alternative Format** for **Written Notices** field which has options of **Audio CD**, **Braille**, **Data CD**, **Large Print**
- Notification Preferences
- Text Phone and Alternate Text Number



- You must click **Save Changes** on any **Detail Entry Panels**. Click **Save Changes** at the bottom of the main center panel. Click **Back to Interview Review** if done making edits to the **Interview** data to return to processor mode.

8. Section: Household

The **Household** screen displays the household members' demographics, and the WMS clearance for any individuals from past cases. All information can be edited by clicking in the text fields/ drop downs.

You can add other members to the case by clicking **Add Member**. **Please note that when making changes on the Household screen, it is critical to click Save Changes and Next in order for your updates to be transmitted to WMS**.

The following information is displayed in this section:

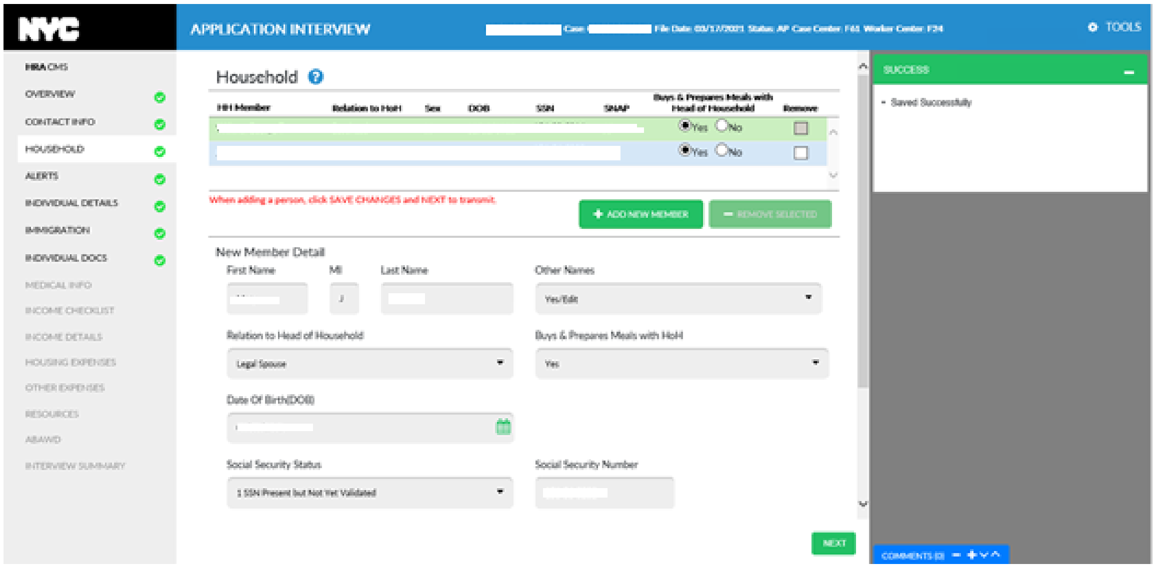
- Household (HH) Member (Last Name, First Name, Middle Initial)
- Relationship to Head of Household (HoH)
- Sex
- DOB
- FS – Status
- Buys & Prepares Meals with Head of Household
- Remove

Member Detail- read only by default

- Name- Relationship to HoH
- Sex
- DOB
- Social Security #
- Ethnicity

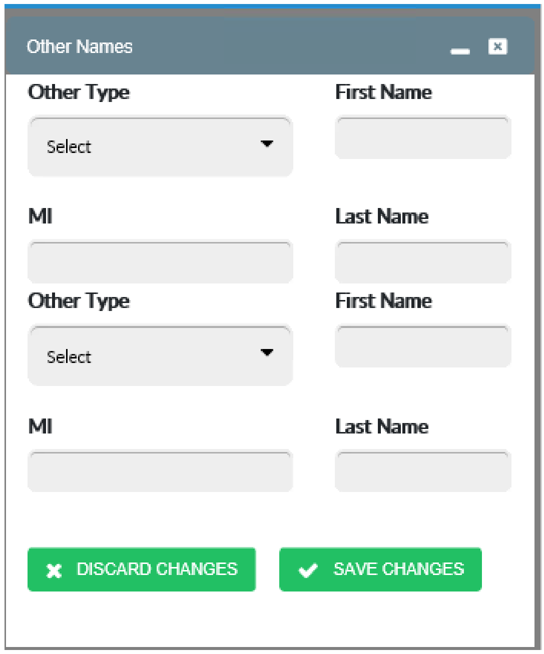
Member Detail- edit mode – must click Edit Record to make changes

- First Name
- Middle Initial (MI)
- Last name
- Other Names
- Relationship to HoH (Head of Household)
- Buys and prepares Meals with HoH (Head of Household)
- DOB
- Social Security status
- Social security Number
- Sex
- Ethnicity

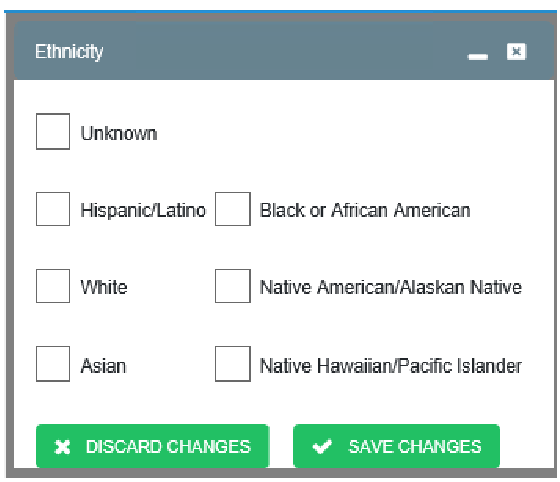


Add New Member on Household screen

- To add an individual to the case, click the **Add New Member** button to display a blank **Member Detail**.
- An individual can also be added from the **Associated Individuals from Past Cases** panel. To add individuals from the **Associated Individuals from Past Cases**, place a check mark in the **Add to Household** check box next to the person you want to add and click the **Add to Household** button.
- If using the **Add New Member** button, type the **First, MI** and **Last** name of the person in the corresponding fields.
- To enter **Other Names** click **Yes/Edit** in the **Other Names** dropdown field to display the **Other Names Detail Data Entry** panel. Enter up to two **Other Names**.
- Select the **Other Type** of name (Maiden, Alias) from the drop-down list.
- Enter the **First**, **MI** and **Last Name** of the person in the corresponding fields.
- Click the **Save Changes** button in the **Other Names** panel to save data, otherwise click the **Discard Changes** button.
- In the **Relationship to Head of Household** field select an option from the drop-down list.
- Enter the **Date of Birth** by entering the date or selecting it from the **Calendar** icon.
- **Social Security Number Status** – (only visible in edit mode) Select one of the options listed in the drop-down list.
- **Social Security Number** – Enter the Social Security Number (SSN) in the text field if it is available.
- Date of SSN application – can be entered only if the “SSN has been applied for, but is not yet available” was selected from the **Social Security Number Status** drop down list.



- **Sex** - Select one of the options listed in the drop-down list.
- **Ethnicity** – To open the **Ethnicity Detail Entry** panel, click on **Yes/Edit** in the dropdown to display the **Ethnicity** detail data entry panel on the right side. Click the **Save Changes** button to save your ethnicity details or click the **Discard Changes** button to exit without saving.

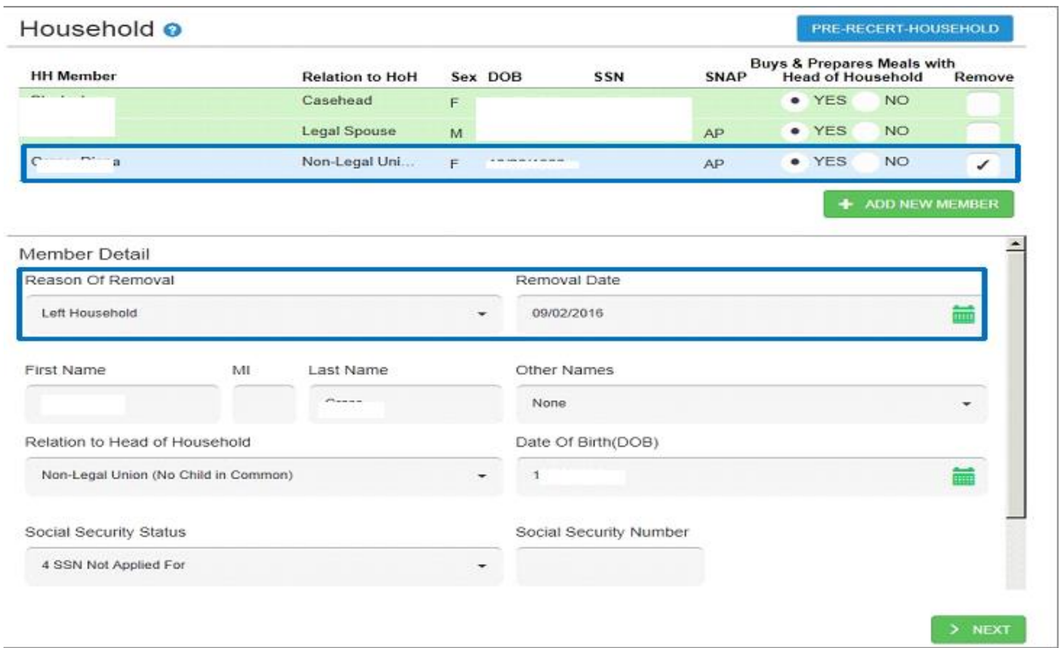


- If finished making edits to that person click **Save Changes** at the bottom of the main panel and **Next** to transmit the newly added person to WMS**.** You can repeat this process to add a third person, etc. Remember you must click **Save Changes** on the main panel and Next to transmit the updates to WMS!!

- Click **Back to Interview Review** if done making edits to the **Interview Data** to return to processor mode

Member Detail – Removal of Individual

- Removal of an individual from within the **Household** screen is **ONLY permissible if that line has not been transmitted to Welfare Management System (WMS)**. If the Worker has mistakenly added an individual to the case in the **Household** screen and has not saved it and clicked **Next**, then that person can be removed. Any data already transmitted to WMS cannot be removed from the **Household** screen. An added person, once transmitted to WMS, must be rejected from the case on the Turnaround Document(TAD).
- To remove a non-transmitted household member, place a check mark in the **Remove** column. Two new fields will display: **Reason of Removal** and **Removal Date**.
- After entering this information click on the **Remove Selected** button.



9. Section: Alerts

The **Alerts** section displays various matches found, which run before the **Alerts** page loads. Some examples of these matches include – **SNAP Benefits Lookup**, **WMS Upstate Clearance**, **WMS Downstate Clearance**, **Intentional Program Violation**. There is also a bulleted list of questions which are read to the applicant/participant. Some examples of information that can be collected on the **Alerts** screen are:

- Is in a special assessment situation.
- Is needed to care for a child under 6.
- Changed or quit jobs/reduced hours.

The screen is divided into two parts:

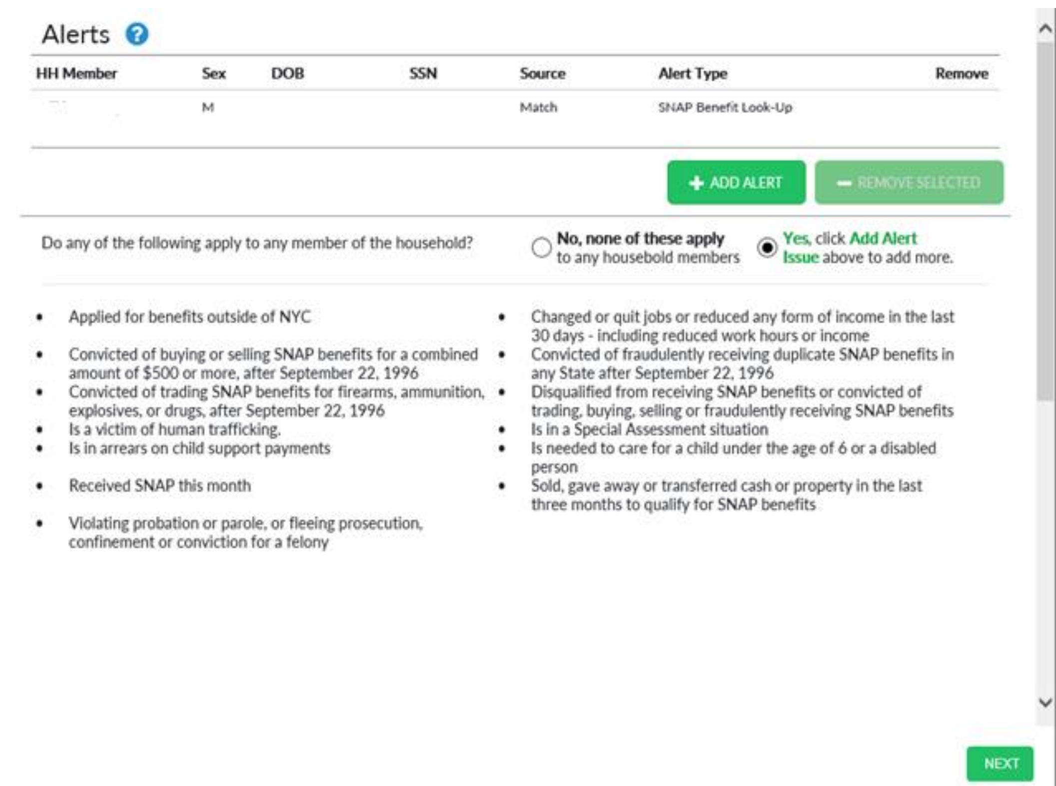
- **Alerts Grid**
- **Question Set in Alerts**

Alerts Grid

The **Alerts Grid** at the top may display household members and the **Alerts** reported for that individual. If any matches are found for the case, a row will exist on the grid for each match. All matches must be reviewed. They cannot be removed by the Worker. The following information is displayed on this section:

- Case member demographics (Name, sex, DOB and SSN)
- Source of Alert
- Alert Type
- Remove – Only applicant/participant reported alerts can be removed. To remove an alert, click the checkbox in the **Remove** column and click the **Remove Alert** button. If no matches are found, then there is an empty grid at the top with the message “No information reported.”

Sample Alerts screenshot



Question set in Alerts

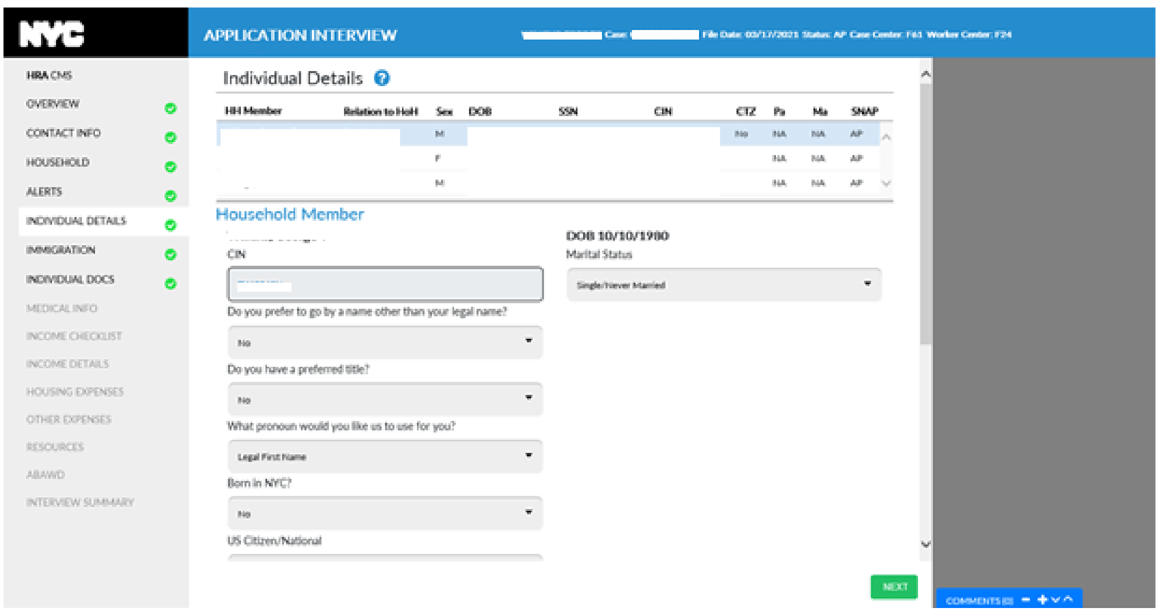
- If **Yes** is selected, click the **Add Alert** button to record information/answer questions displayed as follows in this section:

- The **New Alerts Type Detail** opens, allowing for the recording of new alerts reported by the applicant/participant.
- **Household Member** - Select the household member from the drop-down list.
- **Alert Type** - Select the alert from the drop-down list.

- Select an option from the **Documentation** drop down list.
- Select documentation options and **Save Changes** on the documentation panel.
- The appropriate data fields display on the main panel depending on the Alert type selected.
- After each field has been completed for the alert selected, click **Save Changes**. You may click **Next** to go to the next screen.
- Click **Back to Interview Review** if done making edits to the interview data to return to processor mode.

10. Section: Individual Details

The **Individual Details** section captures necessary WMS indicators for the members listed in the **Household** screen that buy and prepare meals with the case head. Those members that are closed, rejected or do not prepare or buy meals with the case head are not listed. All member information can be edited by clicking in the text fields/drop downs.



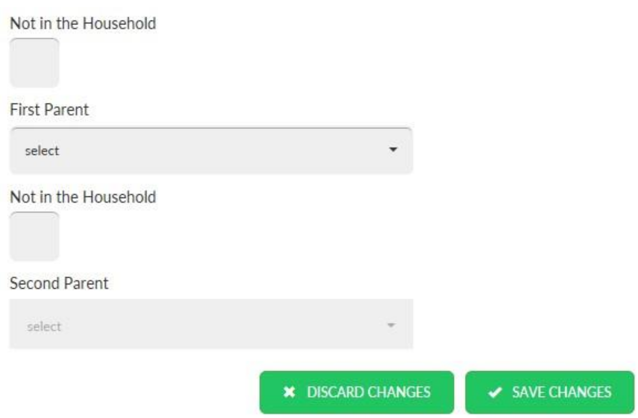
Individual Details Grid

Household member's demographics, citizenship, Program Statuses and Member Detail is visible upon selecting a row. Information can be edited in the main panel.

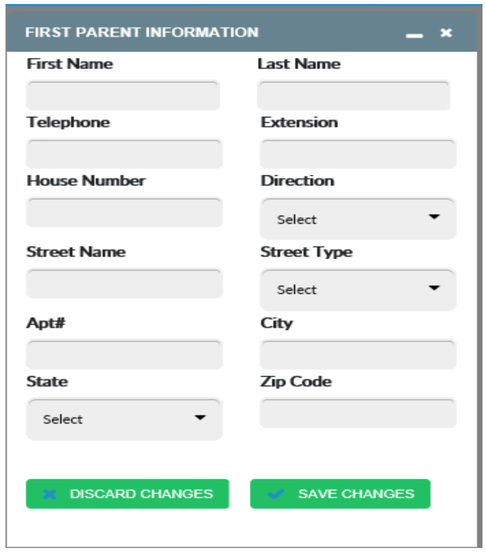
- The **Individual Detail Grid** lists individuals in the household and their demographics, citizenship and Program Status:
  - HH Member
  - Relationship to Casehead
  - Sex
  - DOB (Date of Birth)
  - SSN
  - CIN (Client Identification Number)
  - CTZ (Citizenship)
  - Case Status for PA (Public Assistance), MA (Medical Assistance) and SNAP (Supplemental Nutrition Assistance Program)

- The **Household Member** detail section:
    - CIN
    - Marital Status
    - Do you prefer to go by a name other than your legal name?
    - Do you have preferred title?
    - What pronoun would you like us to use for you?
    - Born in NYC?
    - US Citizen/ National – **If answered No, this field will trigger the Immigration flow**
    - Student Status – **Note:** If a Worker completes the fields in the Institution Name and Student Eligibility detail entry panel that appear on the right side panel the system will determine student eligibility for SNAP benefits.
    - Has Diploma/GED
    - Highest Degree obtained
    - US Military Veteran?
    - Pregnant?
    - Language Spoken

- The **First Parent** and **Second Parent** fields with **Not in the Household** checkboxes will appear for children on the case, see sample below:



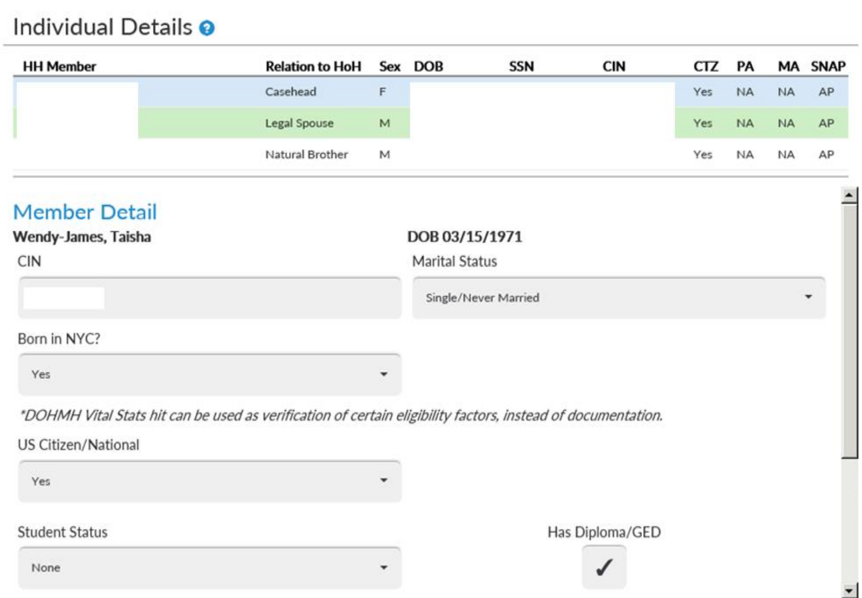
- If the first parent (or second parent) resides in the household, select the name from the dropdown list (the same applies to the second parent).
- If the first parent (or second parent) does not reside in the household, check the **Not in the Household** checkbox in order to open the **Detail Entry Panel** to type in the parent's information. Then click the **Save Changes** button to save data, otherwise click the **Discard Changes** button.



- Click **Save Changes** on the main panel. You must enter Individual details for each person on the case. Click the next person's row on the grid to go on to the next person. When finished, click **Save Changes**. If you wish to return to processor mode, click the **Back to Interview Review** button.

Individual details: Department of Health Vital Stats match (DOHMH Match)

This match appears only if the person was born in NYC. It can be used to verify Identity, Age and Citizenship. This match will first be seen in the **Individual Details** section where there will be a message: "*****DOHMH Vital Stats hit can be used as verification of certain eligibility factors instead of documentation."



- Click **Back to Interview Review** if done making edits to the **Interview Data** to return to the **Processor Mode**.

11. Section: Immigration

The immigration flow is triggered by answering **No** to the **US Citizen/National** question on the **Individual Details** section of Streamline POS.

In the **Application interview**, the immigration flow opens with the 14 immigrant types displayed in the grid on the top of the page.

- The Worker answers Yes to the appropriate immigrant type based upon the documentation provided by the applicant/participant. When **Yes** is answered to an immigrant type, the details for that type opens and includes **Alien Number**, **Date Of Status**, **Date Physically Entered the US**. This information is obtained from the documents provided by the applicant/participant. .

For certain immigrant types, there is another section called **SNAP Eligibility Details** that opens in the immigration flow if the **Date of Status** is less than five years. The immigrant types which open other questions if date of status is less than five years are:

- Legal Permanent Resident
- Battered
- Parolee
- At Least One Year.

The other questions that can be used to determine the non-citizen eligibility for Supplemental Nutrition Assistance Program (SNAP) are:

- If they are serving in the military.
- If they are a veteran.
- If they are currently receiving Social Security Income (SSI).
- If they have **Other Disability** (this opens a subset of further **Other Disability** questions), and the 40 quarters flow.

- **Note: Click Save Changes at each step to ensure proper running of business rules and ensure the opening of more questions**. If the non-citizen is able to meet one of these categories, they will be eligible for SNAP benefits.

How to add another non-citizen of the same immigrant type
Example – you have one **Legal Permanent Resident** already saved in the immigration flow and need to add a second **Legal Permanent Resident**.

In order for you to add a second Legal Permanent Resident on this case,

- Click on **Legal Permanent Resident** (LPR) row again – this should enable the **Add Member** button. When you get the popup message warning you that any data entered will be lost if you do not click **Save Changes**, à **Press OK to this message box will appear**.
- After clicking **OK**, a new blank record appears to allow for selection of a a second person who is an LPR from the household member dropdown. Enter their details and click the **Save Changes** button at the bottom of the page.

There are now two rows on the top grid with a LPR one for the first person who is an LPR and another row for the person you just saved**.**

In order to properly complete the immigration flow:

- Answer **No** to all other immigrant types and the **Summary** row on the top grid must be clicked so that a SNAP eligibility outcome can be determined.

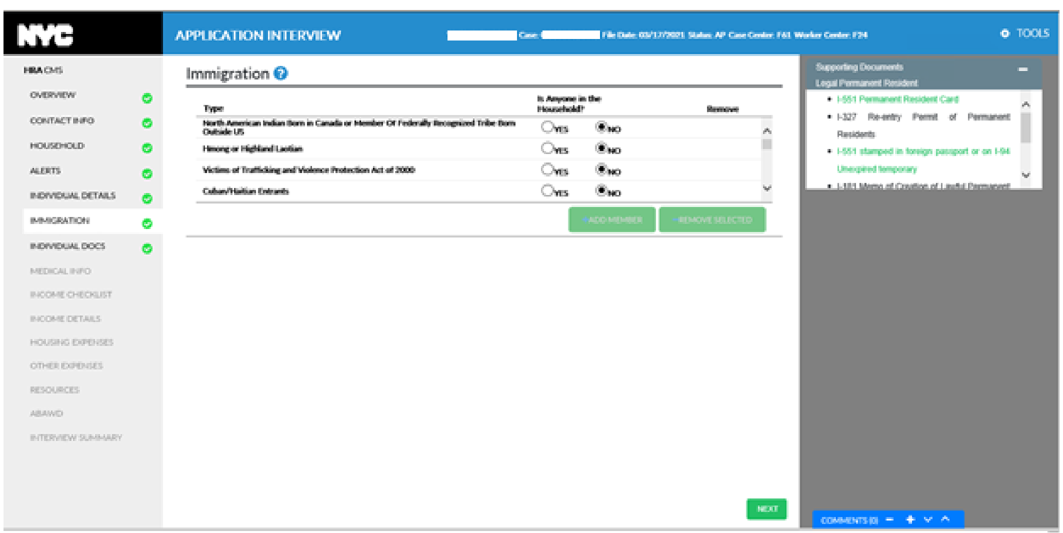
In **Recertification** or **Change Case Data**, the immigration flow will open in **Re-evaluation** mode. In **Re-evaluation** mode, the grid displayed shows each non-citizen and their current immigration information. Any non-citizen that has met a milestone or trigger will be preselected by the system for evaluation. Some examples of milestones/triggers are turning 18 years old, and reaching five years in status.

Newly added non-citizens are also pre-selected for evaluation.

- Click the **Evaluate Selected** button to begin and the system will enter the normal mode of the immigration flow. In normal mode you will see the 14 immigrant types on the grid at the top where selections can be made accordingly.
- A Worker may manually select a non-citizen for evaluation if their immigration status has changed. To do this, check the **Re-evaluate/Evaluate** checkbox and then click the **Evaluate Selected** button. Even if nothing has changed, all immigration information must be reviewed for each non-citizen.

For further details on the immigration flow, please see the Streamline POS Non-citizen workflow release notes at:

https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=e6996fe9-6a43-411e-896f-26dafd405a72&CategoryId=31&VersionDate=5%2f16%2f2018+12%3a11%3a16+PM&FileType=pdf



- Click **Back to Interview Review** when finished making edits to the **Interview Data** to return to the **Processor** mode.

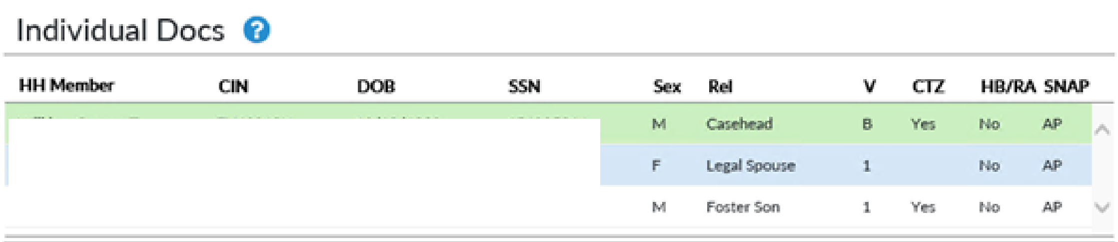
12. Section: Individual Docs

The **Individual Docs** section will pre-set the **Documentation** option to **Existing Documents** if any are found in the One Viewer as well as capturing the document selection for the required eligibility factors for each household member.

It is divided into: **Individual Documents Grid** and **Documentation**. Select the **Documentatio**n option from the drop down list to display the individual data entry panel.

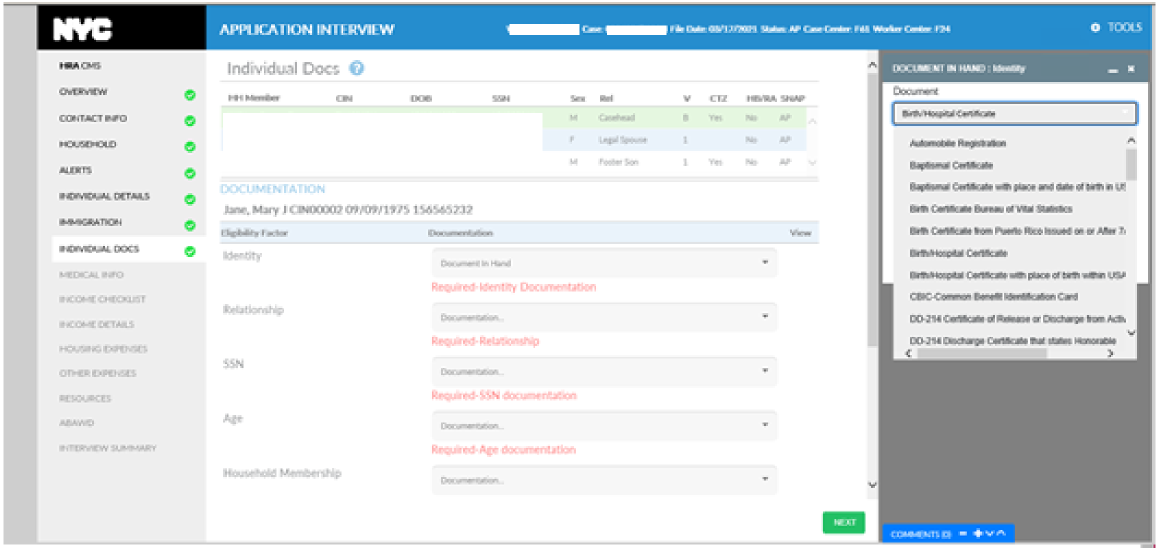
Individual Documents Grid
The **Individual Documents Grid** lists the individuals in the household. Select a row to view the Documentation Eligibility Factors for that individual. The user must select each row on the top to obtain the document information details for each individual on the case:

- HH Member – Household Member
- CIN – Client Identification Number
- DOB – Date of Birth
- SSN – Social Security Number
- Sex - Gender
- Rel – Relationship to Casehead
- V – SSN Validation. Hovering the cursor over the numeric code will display a tooltip with additional information.
- CTZ - Citizenship
- HB/RA – Homebound/Reasonable Accommodation



Documentation for Eligibility Factors for each case member
Documentation – Displays the **Name**, **CIN**, **DOB** and SSN of the individual selected in the grid and consists of three columns: **Eligibility Factor**, **Documentation**, and **View**. The eligibility factors trigger the **Documentation** drop down list when selected. The eligibility factors are:

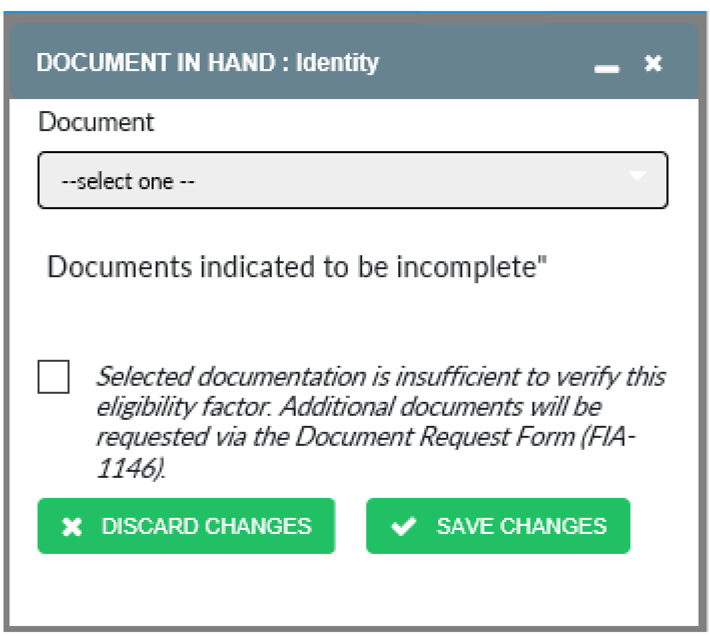
- Identity
- Relationship
- SSN
- Age
- Household Membership
- Citizenship
- Student Status (if applicable)
- Veteran Status (if applicable)
- Residence

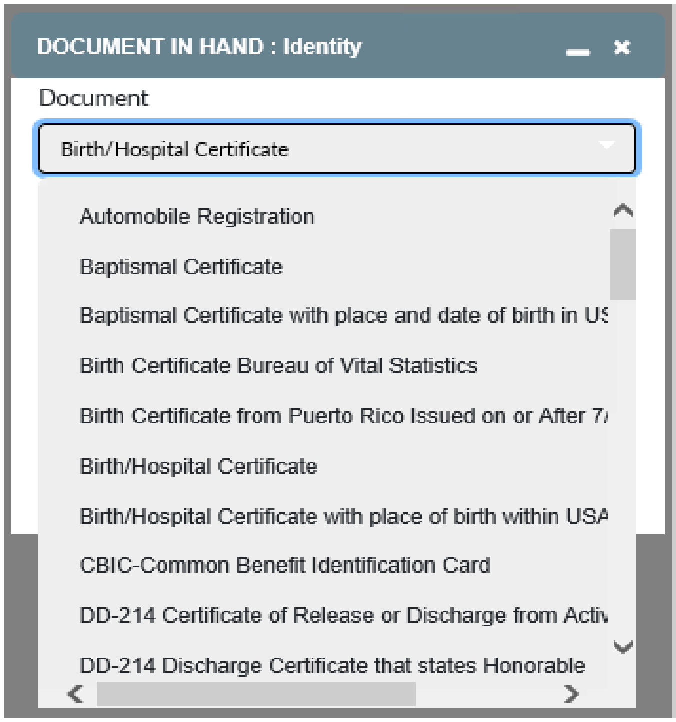


The **Documentation** options are specific to that eligibility factor. The drop-down list includes the following:

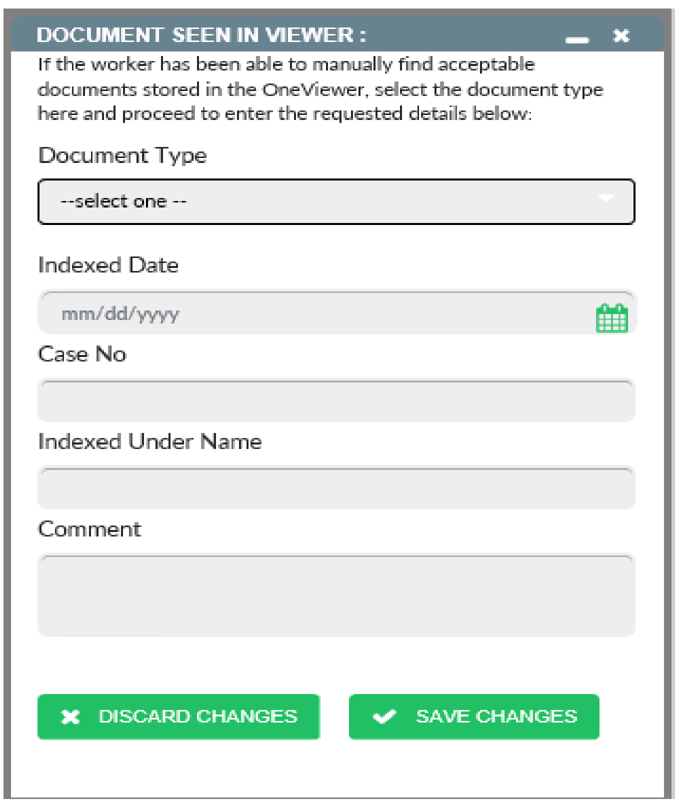
- **Document in Hand** – Selecting **Document in Hand** from the drop-down list, opens a **Detail Data Entry Panel** on the right side of screen:

    a. Select the specific document provided from the drop-down menu.
    b. If the document selected is not sufficient enough to verify the eligibility factor, the interviewer can click the checkbox next to: **Selected document is insufficient to verify the eligibility factor. Additional documents will be requested via the document request form** You Must Submit Documents For Your SNAP Case! **(FIA-1146)**.
    c. To save any changes made, click the **Save Changes** button; otherwise click the **Discard** button.

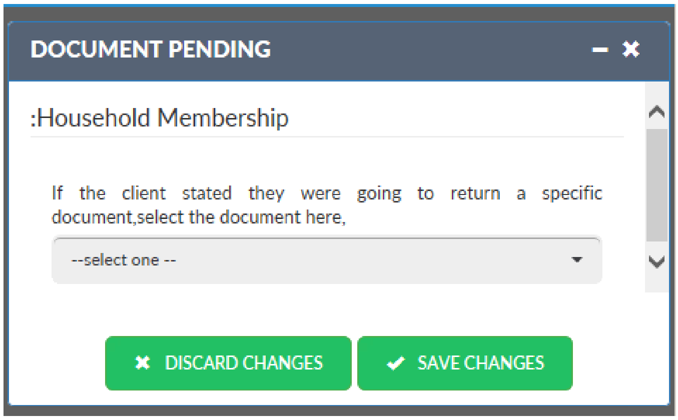




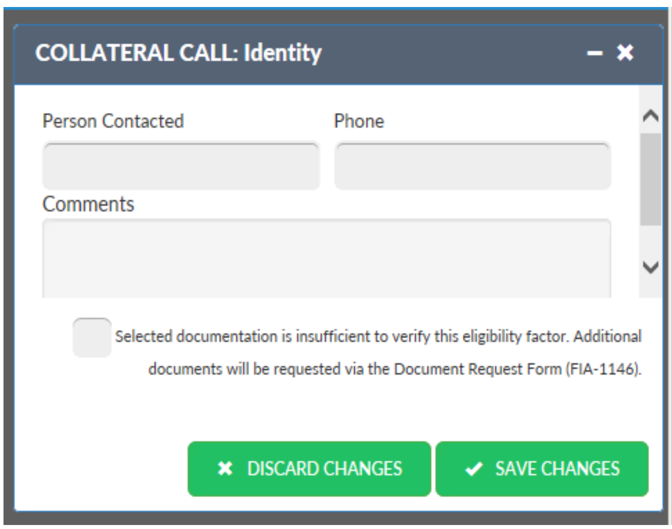
- **Document Seen in Viewer** - Opens the **Detail Data Entry** panel on the right side of screen.



- **Document Pending**- Opens the **Detail** panel on the right side of screen.



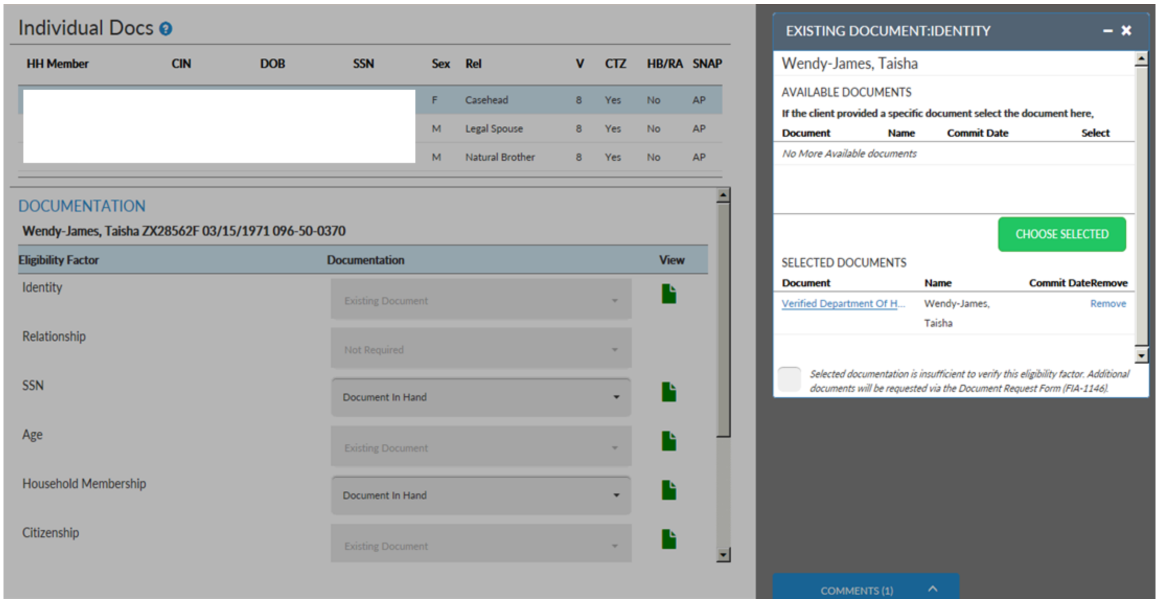
- **Collateral Call (if applicable) –** In the **Collateral Call Detail Entry** panel, enter the name of the **Person Contacted**, and **Phone Number** and enter in the **Comments** type the verification information supplied by the person contacted. Click **Save Changes** on the panel or **Discard Changes** to cancel.



- **After Documentation is selected –** A green paper icon appears next to the **Documentation** drop down to confirm what verification has been selected. It appears next to **Document Pending**, **Document In Hand, Document Seen In Viewer, Collateral Call.** Re-open the panel to see what documents were selected. The paper icon will also display for **Existing Documents**. This option is pre-selected by the system.
- Click **Save Changes** at the bottom of the main panel before going on to click the second person on the grid. Documentation must be provided for each person on the case.

Individual Docs: Department of Health Vital Stats match (DOHMH Match)
This match can also be seen in the **Individual Docs** section in the **Existing Documents** panel with a selection that reads **Verified Department of Health match**

Note: Do not click on any links that are matches – the system will malfunction.



- Click **Back to Interview Review** if done making edits to the **Interview Data** to return to the Processor mode.

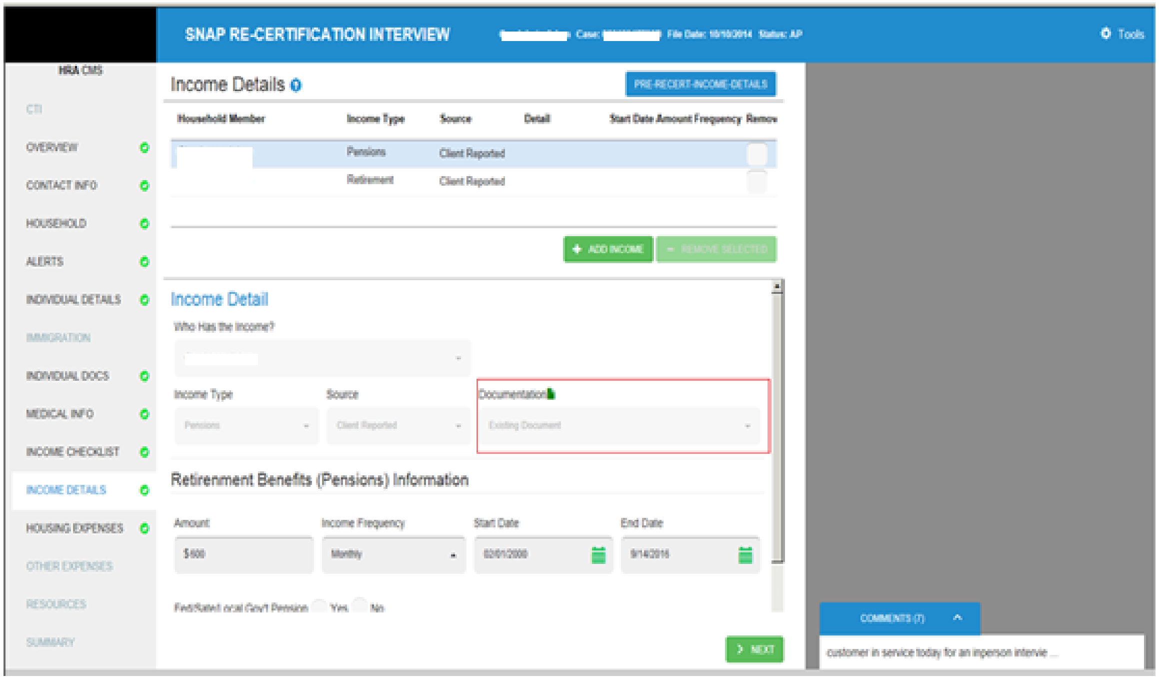
Individual Docs: How to address Existing Documents

- For each of the eligibility factors where the system is showing **Existing Documents**, staff must click on the green paper icon to open up the **Existing Documents** panel which will then display the documents the system found.
- Click on the hyperlink to view the document(s) that were found by the system. Once the user determines document is determined sufficient, check the **Select box** and click on the **Choose Selected** button. This will "permalink" the document to be used as verification for this eligibility factor.
- If the documents found by the system are not sufficient, then check the box that says **Selected documents is insufficient to verify this eligibility factor. Additional documents will be requested via the Document Request form**.
- When finished selecting documents for a particular eligibility factor, then click on the **X** in the upper right corner of the **Existing Documents** panel in order to close it and go on to the next eligibility factor that has **Existing Documents**.
- <u>Once the process is completed for the first person on the case, click **Save Changes** at the bottom of the page. Click the second person on the case and repeat the whole process again. Remember to click **Save** Changes on each person before going to the next person.</u>

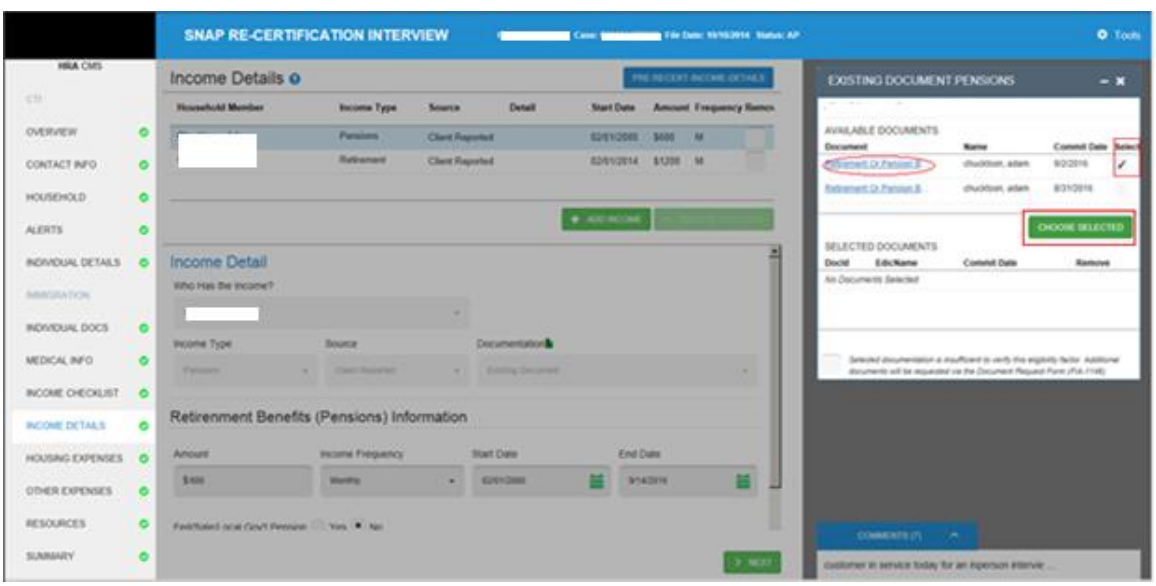
When the process is completed for the last person on the case, click **Save changes** on the main panel before clicking the **Next** button. Existing Documents can also appear in other sections of the interview.

<u>Detailed Example of Existing documents found by Streamline POS</u>
This process should be followed for each eligibility factor or question where the system found **Existing Documents**.

- Click on the green icon to open the side panel that will show the documents found by the system.

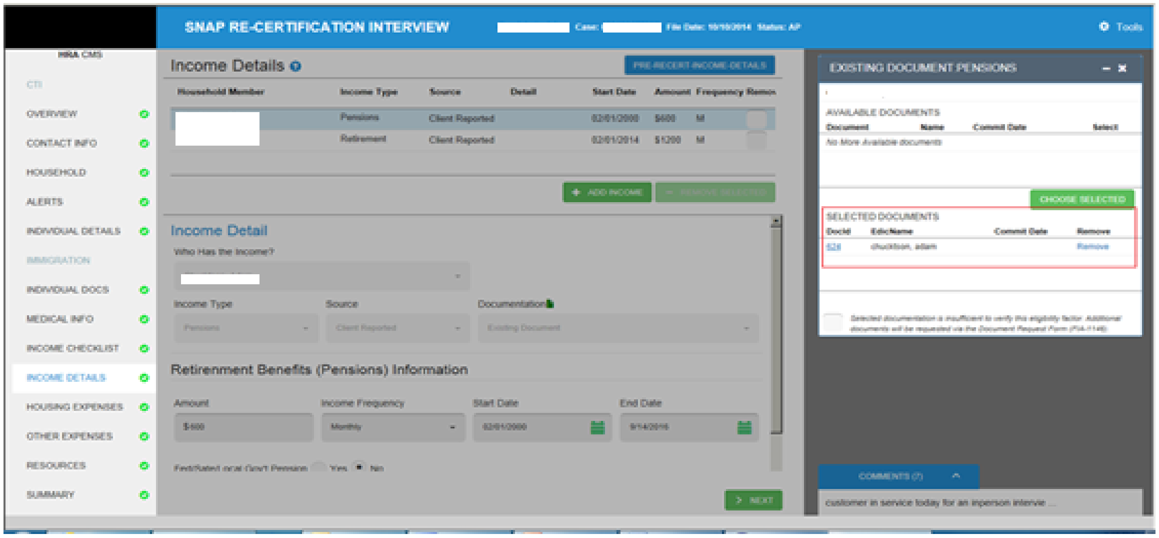


- Each document found is hyperlinked. Click on the **hyperlink** – this will open the document found by the system.

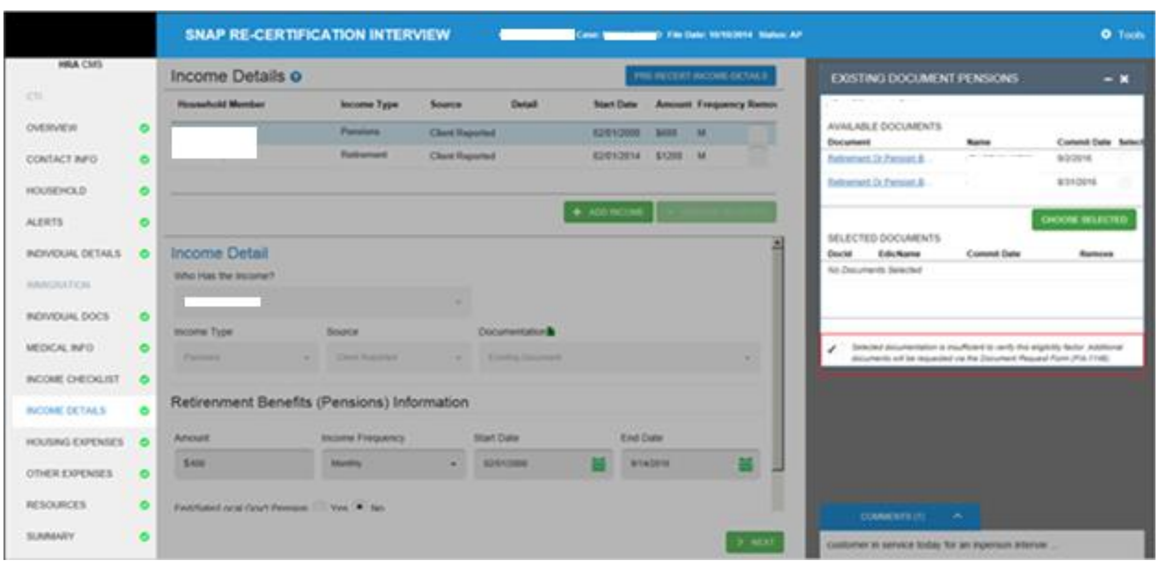


- Once the document is determined sufficient and you want to reuse it to satisfy the eligibility factor or question, then check the **Select** box and click on the **Choose Selected** button.

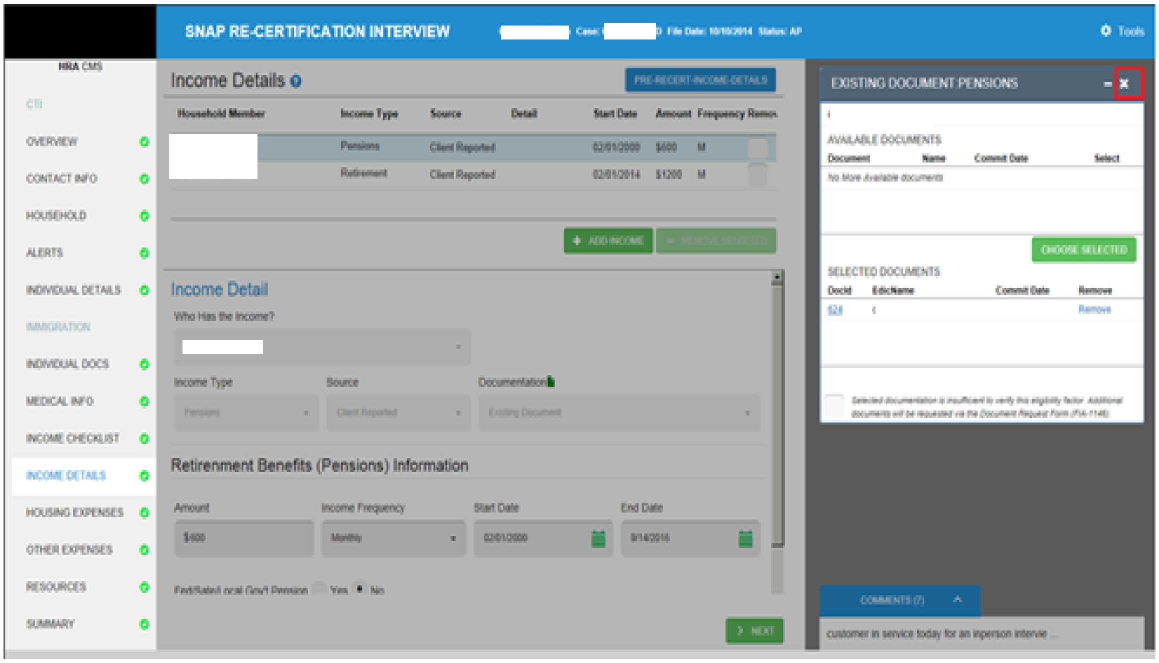
- The document you choose will become “perma linked” to that eligibility factor or question. The document chosen will appear in the **Selected Documents** portion of the panel, as shown in the screenshot below.



- After reviewing all documents found by the system, if the documents are not legible or are not sufficient enough to reuse/satisfy the eligibility factor or question, then check the box at the bottom of the panel that says **Selected documents is insufficient to verify this eligibility factor. Additional documents will be requested via the Document Request form.** This will make that question/eligibility factor appear on the **FIA-1146**, as per the screenshot below.

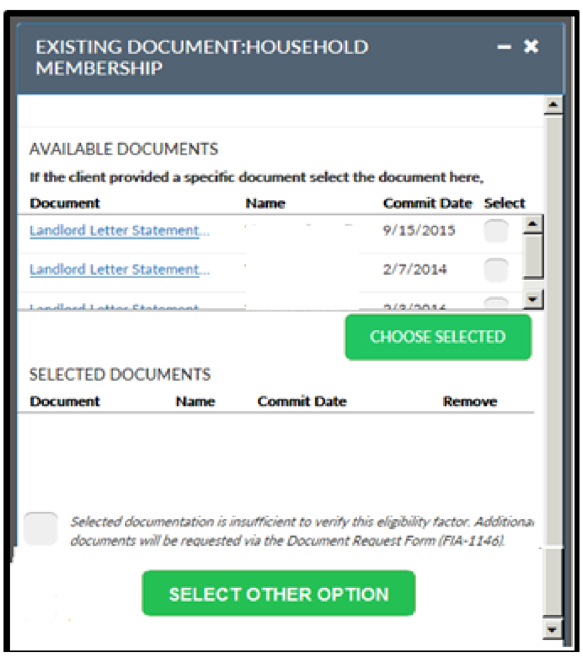


- When finished making selections on the **Existing Document** side panel, close the panel by clicking on the **X** in the right-hand corner.



Note*:* In the event that the document found by the system is not for the desired person or to reset the factor that has **Existing Documents**, click the **Select Other Option** button at the bottom of the panel.

- Click the **Select Other Option** button to select any valid selection from the dropdown such as **Document in hand**, **Document Seen in Viewer**, **Document Pending**, etc.



- When finished making documentation selections for the first person on the case, Click **Save Changes** at the bottom of the page.

- Go to the next person on the case by clicking the **second row** on the grid. Repeat this process for each eligibility factor which has **Existing Documents** selected.
- Remember to click **Save Changes** at the bottom of the main panel once you finish a person before clicking on the next person on the case.
- When finished going through each person (and clicking **Save Changes** on each person) then click **Next** to move to the next section of the interview. Click **Back to Interview Review** to return to Processor mode.

13. Section: Medical Information

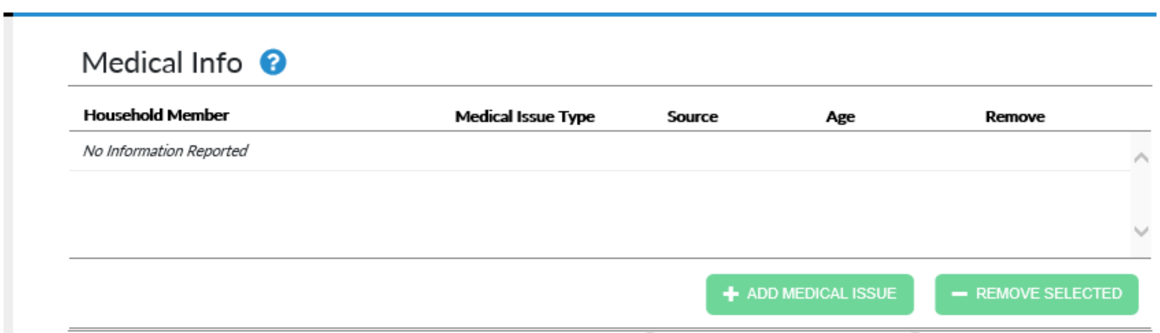
This section captures medical limitations, medical issues and requests for home visit or homebound status. It is divided into two parts**: Medical Information Grid** and **Medical Issue Detail** section**.**

Medical Information Grid

The following information is displayed for any individual with medical issue:

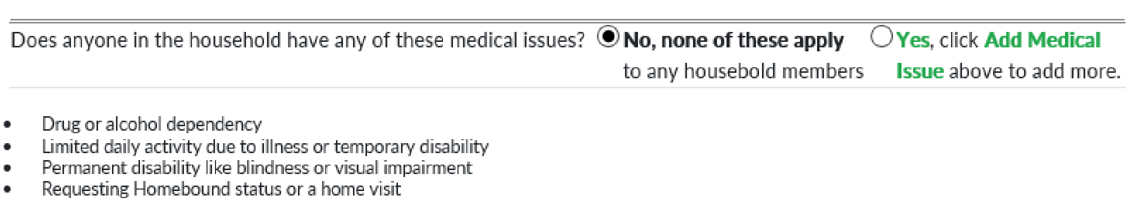
- Household Member
- Medical Issue Type- Either "Client Reported" or "In Case Record" displays
- Source
- Age
- Remove

The **Medical Information Grid** displays information if there is a medical issue for one or more individuals otherwise it will display *No Information Reported.*



- To record a medical issue answer **Yes** to the following question in the **Medical Information Grid**: "Does anyone in the household have any of these medical issues?"

If none apply, select **No, none of these apply to any household member**. If **Yes** is selected, click the **Add Medical Issue** button and the **Medical Issue Detail** view is displayed. The. **Medical Issue Detail** view is specific to medical issues being added.



- In order to add a medical issue answer **Yes** and then click the **Add Medical Issue** button. All information can be edited by clicking in the text fields/dropdowns. To remove the **Medical Issue**, click the checkbox in the **Remove** column and click the **Remove Selected** button.

Medical Issue Default View
The different types of medical issues are displayed under the question *"Do anyone in the household have any of these medical issues?"*

- Drug or alcohol dependency
- Limited daily activity due to illness or temporary disability
- Permanent disability like blindness or visual impairment
- Requesting Homebound status or a home visit

Note: To indicate a person is disabled, the Worker must answer **Yes** to **Medical Info**, and click the **Add Medical Issue** button. In the Details section that open, select the person, choose **Medical Issue Daily Activity Limited**, select **Disabled** in the **Details** section, and answer all the other fields that appear in the **Details** section.

New Medical Issue Detail View
The **Medical Issue Detail View** allows for the recording of new medical issues reported by the applicant/participant.

- Household Member-Select the <u>Household Member</u> from the drop-down list.
- Medical Issue type - Select the <u>Medical Issue</u> from the drop-down list.
- Select an option from the <u>Documentation</u> drop down list.
- The appropriate data fields display depending on the option selected.
- Select **Documentation** from the drop-down list.
- Click the **Save Changes** button to save data, otherwise click the **Discard Changes** button.
- After each field has been completed for the **Medical Issue** selected, click the **Next** button to go to the **Income Checklist**.
- Click **Back to Interview Review** if done making edits to the **Interview Data** to return to the Processor mode.

14. Section: Income Checklist

This section provides information on the types of incomes received by household members. It is divided into the following tables: **Employment Status**, **Unearned Income**, and **Other Income**. The **Employment Status** section shows rows for each member in the household over the age of 16. The **Unearned** and **Other Income** sections display a row for each member in the household.

- Place a checkmark in the corresponding checkbox to denote employment or income status.

Note: When an income match is received the box will be shaded after the page loads. If the income is submitted via Access HRA the box will have a checkmark after the page loads and can only be removed from the **Income Details** screen. Income matches cannot be removed and must be addressed.

Employment Status
All tables display the household member's name with their date of birth. Every row in the **Employment Status Table** must have one box checked. If none of them apply to any of the household members, check **No One**.
The income type columns are:

- Employed
- Self-Employed
- Migrant Farmer
- Unemployed or Affected by a Strike
- Volunteer
- Never Worked

Unearned Income
The **Unearned Income** and **Other Income** tables must have at least one box checked per column. If none of them apply to any of the household members, check **No One:**

- Social Security Benefits (SSI, Disability, Dependent
- Benefits, Retirement, Survivor)
- UIB (Unemployment Income Benefits)
- Workers' Comp
- Child Support

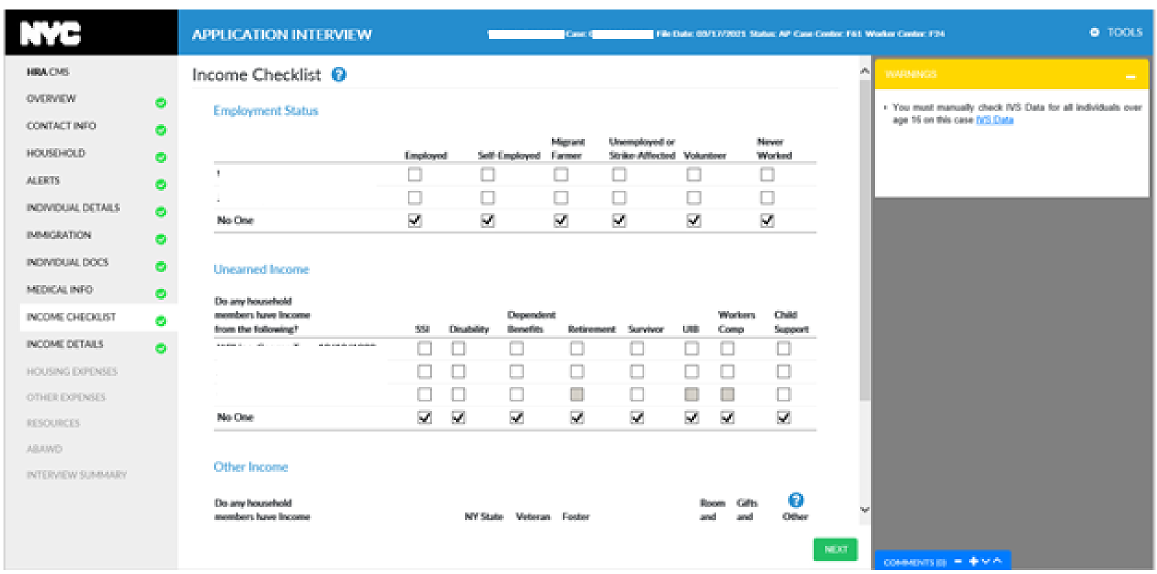
Other Income
Other Income has the following columns:

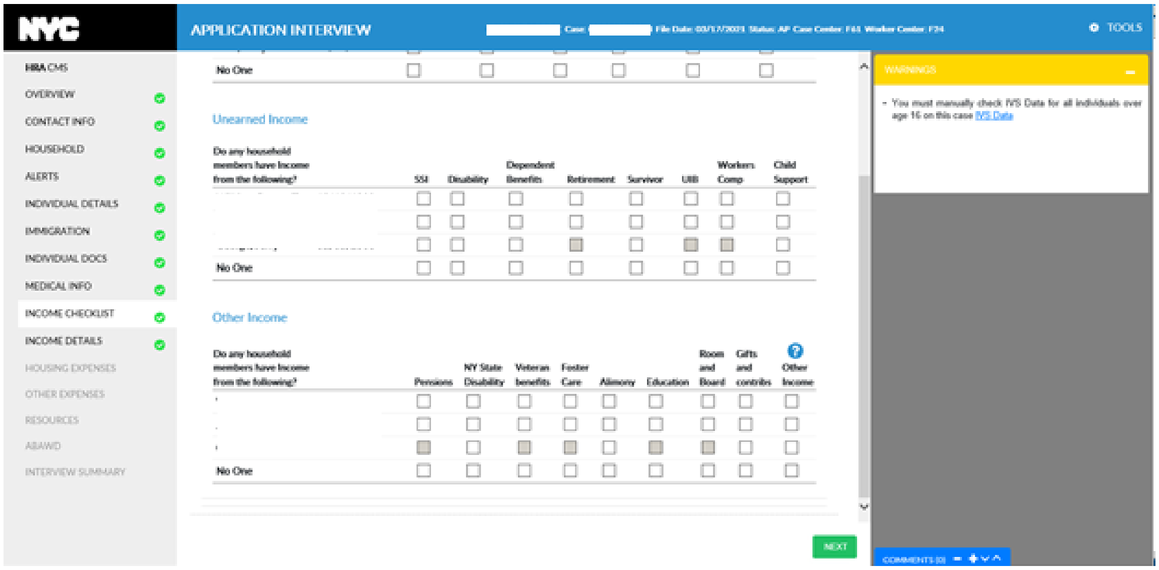
- Pension
- NY State Disability
- Veteran Benefits
- Foster Care
- Alimony
- Education
- Room & Board
- Gifts & Contributions
- Other Income

The **Other Income** column has a blue icon with a question mark ? above it. Click on the **Icon** to view a list of other income types:

- Adoption Subsidy
- Assistance from another State
- Black lung disease
- Census Income
- CEOSC (Comprehensive Employment Opportunities Support Center)
- College Work Study
- Dividends/Interest from Stocks, Bonds, and Savings etc.
- Earned Income from Job Training Partnership Act (JTPA)
- Earned Income from JTPA/On Job Training (OJT)
- GI Dependency Allotments
- HUD Utility Allowance
- Income from a trust
- Income in kind
- Lump sum payment
- Money from another person
- Money from Charity
- Office of vocational rehabilitation (OVESID)

- On the job training
- Other earned income
- Publica Assistance (PA) only-Excess support payment
- Payments from an annuity
- Payments from Property Sold
- Private Disability Insurance – Health/Accident Insurance Policy
- Public Assistance Grant
- Railroad Retirement Benefit or Railroad Dependent Benefit
- Rental Income
- School to Employment Prog. (STEP)
- Severance pay (Not Lump Sum)
- Severance pay - Lump Sum Payments
- Sick Disability
- Training and Employment Assistance Program (TEAP)
- Training Allotment
- Union Benefits (Including Strike Benefits)
- Veterans Assistance (VA) Spina Bifida Benefits
- Voluntary Work-NON-VISTA
- Volunteer in Service to America (VISTA)
- Work Experience Non-WIN
- Youth Build
- Other Earned Income
- Other Unearned Income





15. Section: Income Details

This section captures and displays the details for each recorded **Income Type** and the recipient of matches found on household members will also display in the **Income Details** section. Income matches found on household members will also display as a row on the grid. All income matches must be addressed.

All found matches must be resolved by recording whether the match is being disputed by the applicant/participant. If the applicant/participant disputes the match, supporting documentation must be submitted to provide proof.
Income Details is divided into the **Income Grid** and **Income Detail** sections.

Income Grid
The **Income Grid** displays all income reported via Access HRA or during an interview for all household members. The **Income Grid** has the following columns:

- HH Member name
- Income Type
- Source
- Detail (e.g., employer name)
- Start Date
- Monthly Amount
- Frequency
- Remove checkboxes – enter checkmark to remove row from grid.

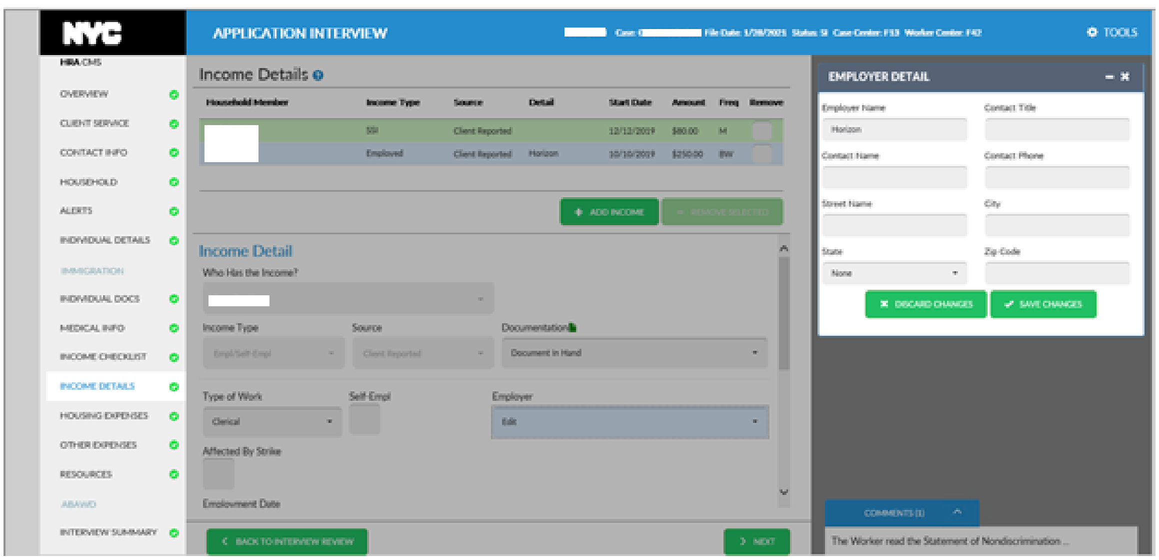
To view the **Income Details** screen, select a row from the **Income Grid**:

- To add new income, click the **Add Income** button. A blank **Income Detail** screen will open.
- The **Income Detail** view displayed via selecting a row will open to information based on the specific Income Type. All income information can be edited by clicking in the text fields and drop-down lists.
- The main section of **Income Detail** has the following drop downs to select an option from:
  - Who has the Income? – Select name of household member with the income
  - Income Type – Select type of income

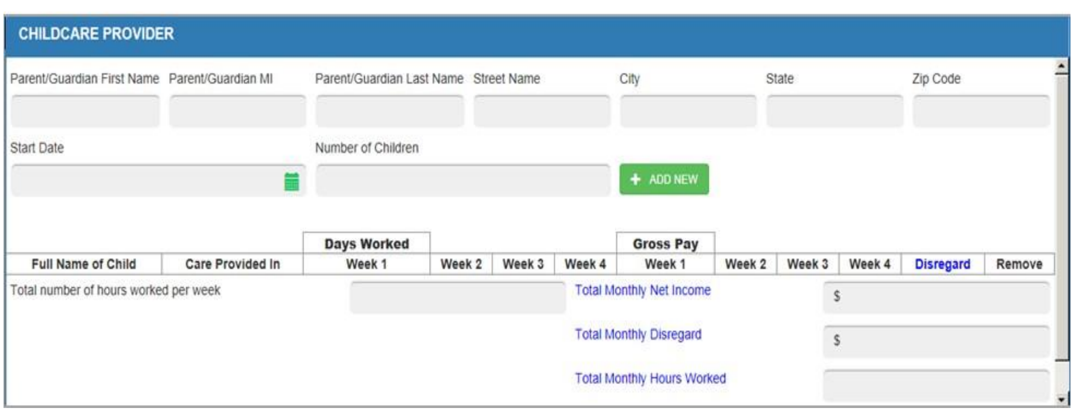
- Source –
  - This is not a Worker selected field. The system will prefill this to **Client Reported** if it came in from Access HRA and also when the Worker is adding the income during the interview. The system prefills **Match** if there is a match row on the grid and the Worker is reviewing the match.
- Documentation – Select documentation option.
- Depending on the income type selected there are three possible **Detail Data Entry** panels that may appear:
  - **Employer Detail Panel**- for all employment income types except the Childcare provider.
  - **Childcare Provider Detail Panel** – appears only for the Childcare provider
  - **Income Reporting Panel** and **Self Employment Ledger** – for Self-Employed Income Type only

- Click the **Save Changes** button to save data, otherwise click the **Discard Changes** button.
- Click the **Back to Interview Review** button if finished editing data to return to the **Processor** mode.

Employed income with Employer Detail Panel

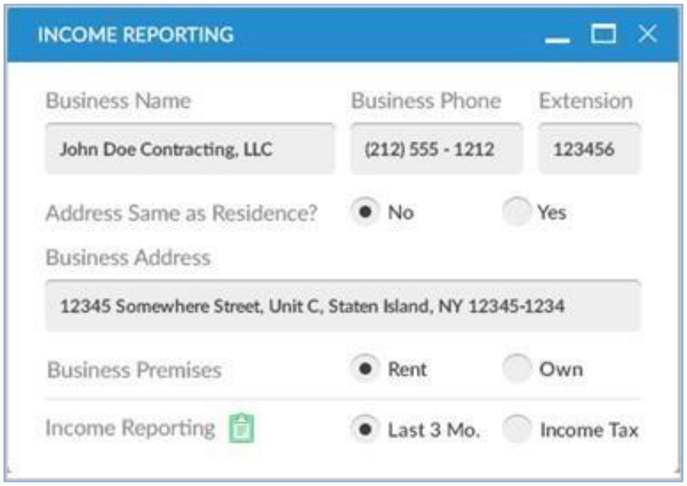


Example - **Childcare Provider Details** window

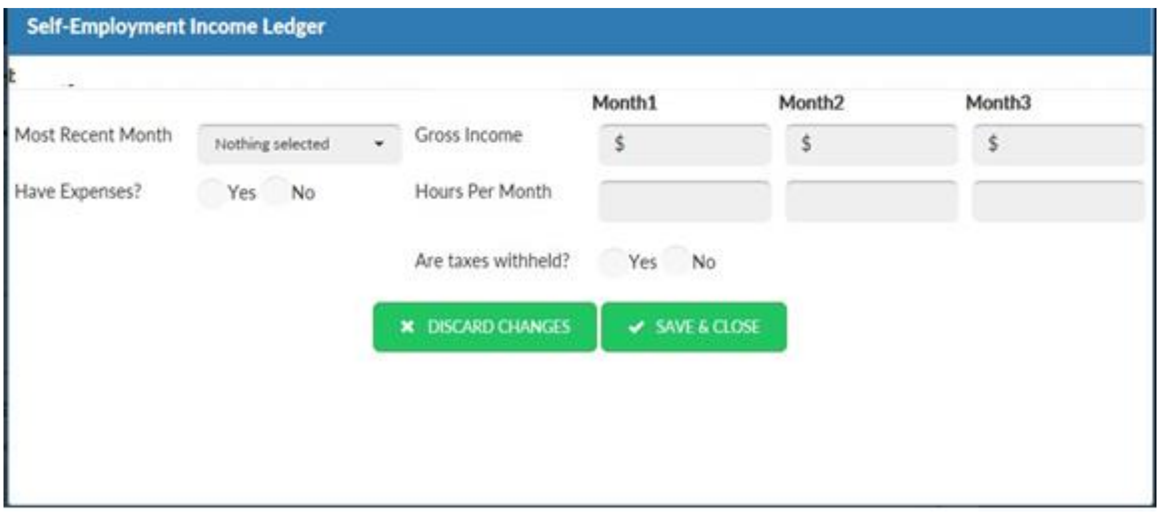


For self-employment income type only

Income Reporting Detail Panel



Self-Employment Income Ledger



Income Details: OCSE Child Support Income Match
The Office of Child Support Enforcement (OCSE) Child Support income match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for child support income. Remove the **Client Reported** row and use the match**.**

Streamline POS calculates the amount that should be budgeted.

Budget and dispute logic:

- Match data remains read only.

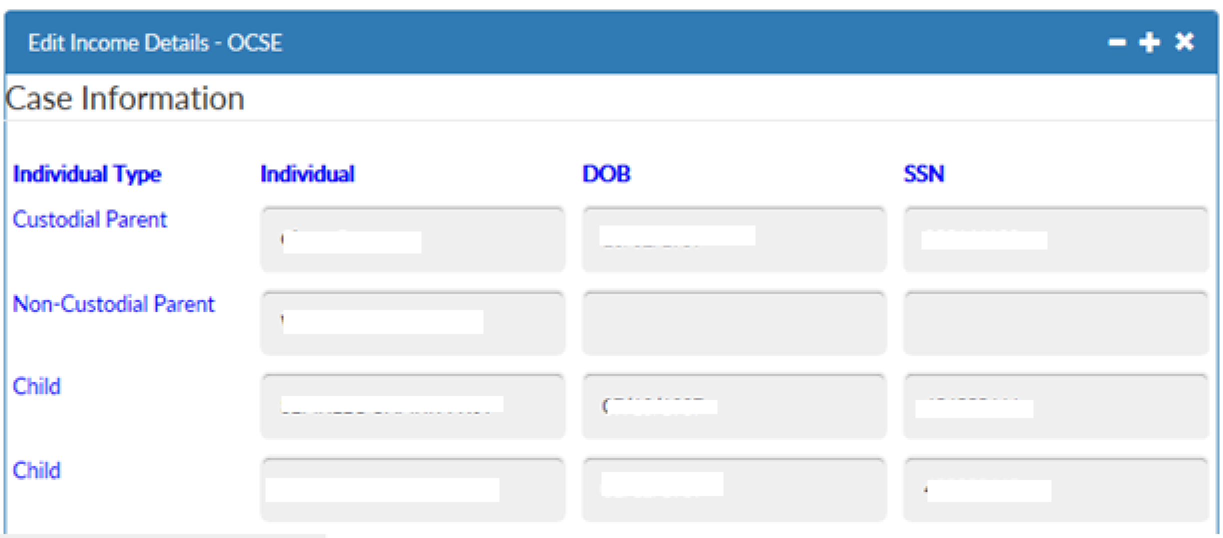
- Missing data must be entered by the Worker.
- Budgeting and averaging of income follow current procedure.
- POS applies lump sum criteria from current procedure in the budget for non-recurring income.
- Income is budgeted unless proper documentation is submitted.
- If successfully disputed, a data entry section opens, and the Worker can enter an end date or update the income

Applicant/Participant Dispute options:

- Amounts are incorrect.
- No longer receiving payments,
- Match information is accurate.

Note: In order to successfully dispute the match, select either **Amounts are Incorrect** OR **No longer receiving payments**. Select **Document in hand** if you have proof of this, and pick **Document Satisfies Dispute** for the **Dispute Outcome** so that the data entry fields will open for the Worker to update the match.

Sample screenshot of OCSE child support income match to update the match.



Income Details: TALX (Work Number Service) match
The TALX match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job. Remove the **Client Reported** row and use the match.

When all data is present and the match is accurate, data from match is budgeted:

- For monthly income, first month of available income is budgeted.
- For bi-weekly and semi-monthly income, the average of two payments is budgeted.
- For weekly income, the average of four weeks is budgeted.
- If frequency is hourly, the pay dates are used to determine frequency.

Budget and dispute logic:

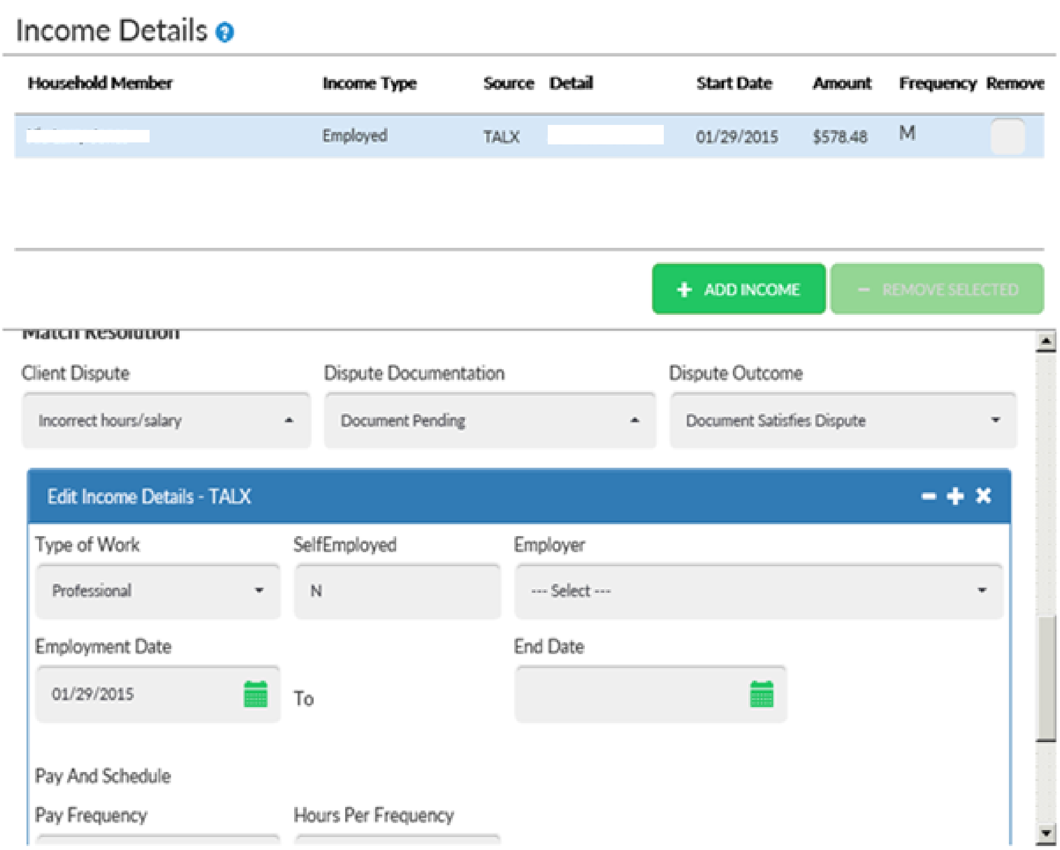
- If income is outdated, the Worker must dispute to prevent income from going to budget.
- Match data remains read only.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- Missing data must be entered by the Worker.
- The Worker can defer for documentation.
- If successfully disputed, a data entry section opens, and the Worker can enter an end date or update the income.

Applicant/Participant dispute options:

- Never Worked for this employer
- No longer working for this employer.
- Incorrect hours/salary
- Match information is accurate.

Note: In order to successfully dispute the match, select either **Incorrect hours/salary** if the applicant or participant is still working for that employer. Select **Document in hand** if you have proof, and pick **Document Satisfies Dispute** for the **Dispute Outcome** so that the data entry fields will open for the Worker to update the match. If No longer working for this employer, a job termination letter should be provided by the applicant/participant.

Sample **TALX match** screen to update the match.



Income Details: Automated Child Care Information System (ACCIS) Childcare Provider Match
The ACCIS childcare provider match will appear as a row in the top grid in the **Income Details** section of SPOS if present on the case.

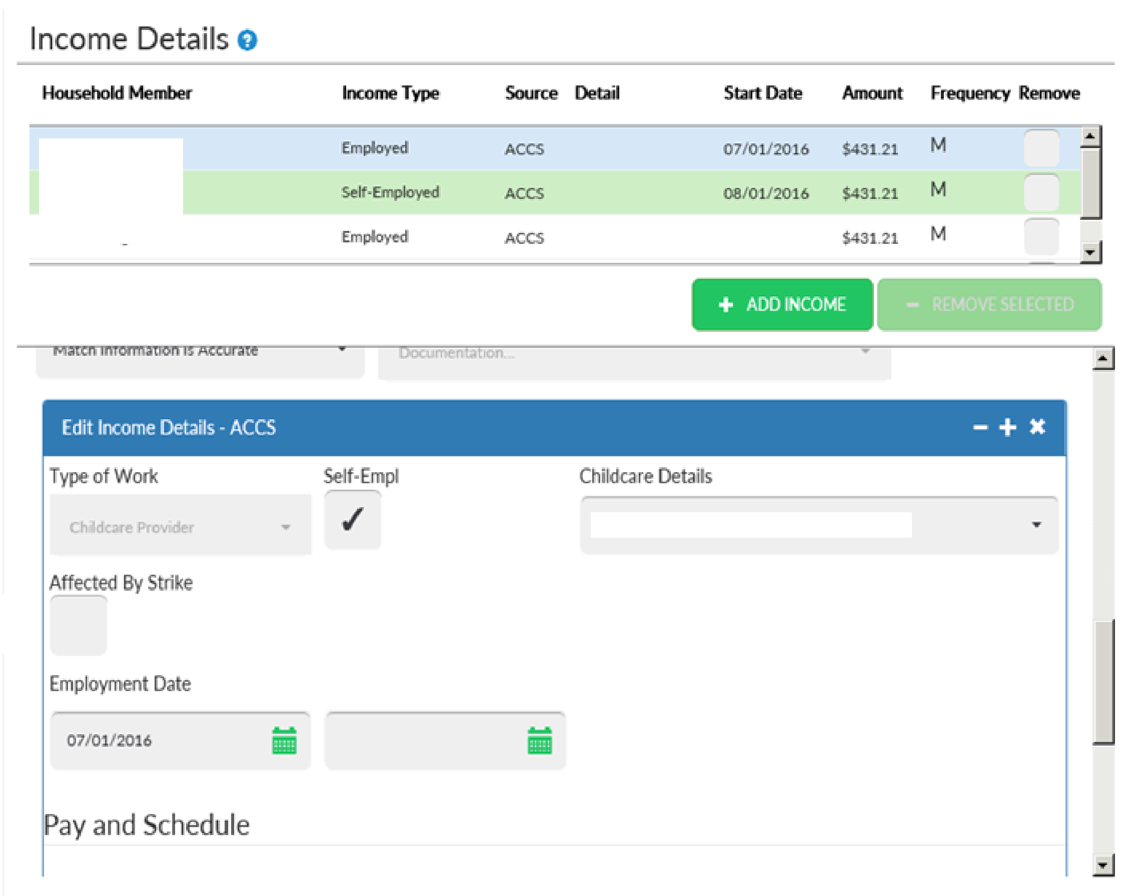
Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for employment as a childcare provider**.** Remove the **Client Reported** row and use the match**.**

The ACCIS match does not include days worked per week, hours worked per week, or income disregard info. Information Verification Service (IVS) groups the information by provider. Information in Streamlined POS is by child as needed for the budget. The Worker enters the childcare provider details.

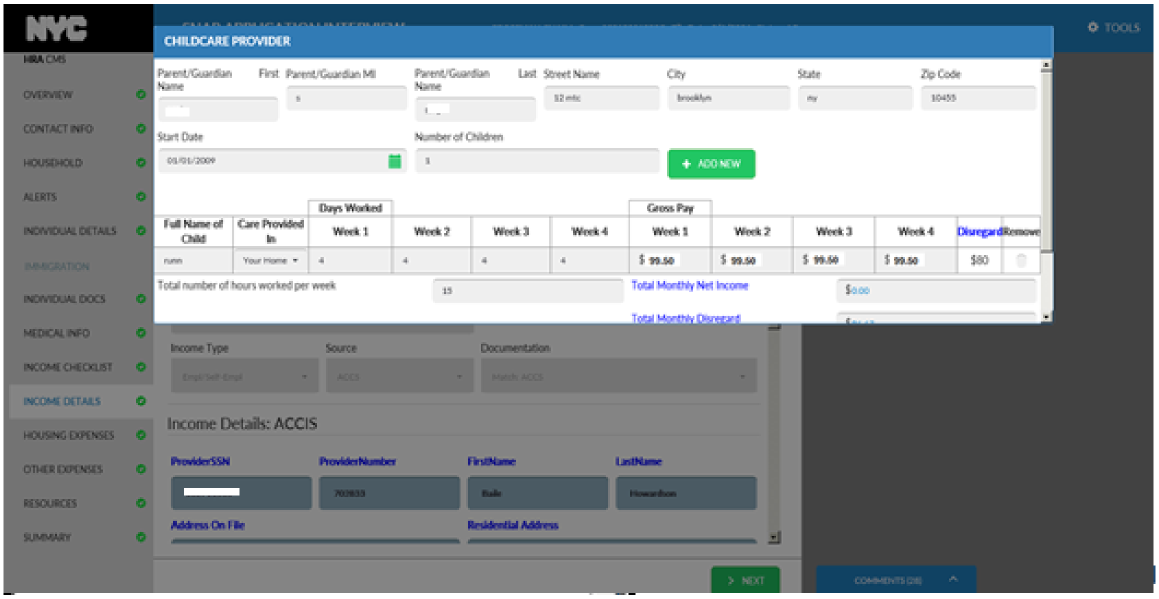
Budget and dispute logic:

- The **Detail** section opens even when the match is accurate.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- Missing data must be entered by the Worker.
- The Worker can defer for documentation.

Sample screenshot of updating the ACCIS match



ACCIS Match Childcare Provider Details window



Income Details: FISA/NYC Employee match
The Financial Information System Agency (FISA) match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job**.** Remove the **Client Reported** row and use the match.

The FISA match does not include hours worked, which are required for budgeting, employment code determination and Able Bodied Adults Without Dependents (ABAWD). Hours worked must be entered by the Worker:

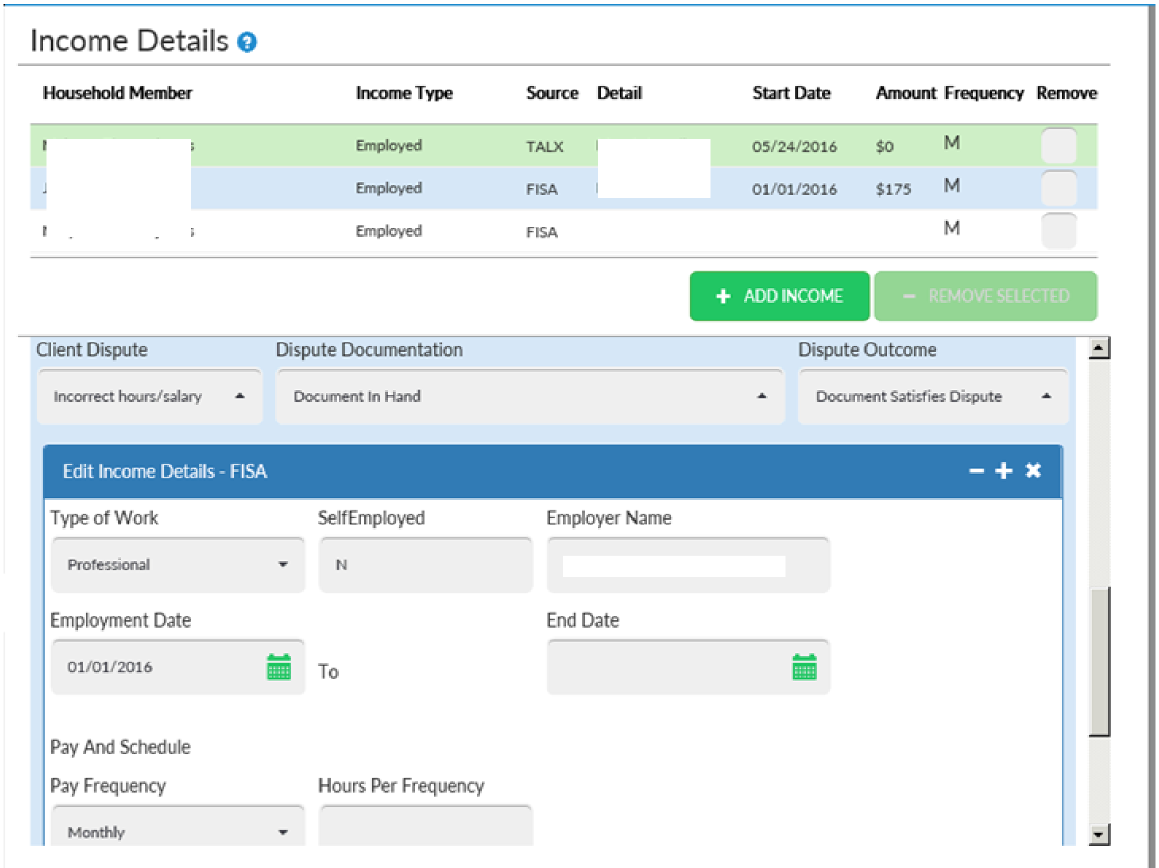
- Client dispute: Incorrect hours/salary
- Documentation: Worker selection – document needed for employment code and ABAWD
- Dispute outcome: Document satisfies dispute.

Budget and dispute logic:

- If income is outdated, The Worker must dispute to prevent income from going to budget.
- Missing data must be entered by the Worker.
- Match data remains read only.
- If the Worker does not enter hours worked, then an error message appears in budget.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- The Worker can defer for documentation.

Sample screen of **FISA** match –

- **Select Client Dispute Incorrect hours/salary** in order to update the hours worked**.**



Income Details: Wage Reporting System (WRS) RFI match
The WRS match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job. Remove the **Client Reported** row and use the match.

- The Worker reviews the information shown in the match and selects **Not disputing/new information** to add the Resource File Integration (RFI) to the case.
- The Worker can defer the income if the above option is selected or update the information/amounts in the match.
- The Worker must enter income as zero amount if the income should not appear in the budget. This is a Worker determination.

Income Details: New Hire RFI match
The **New Hire** match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note; In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job. Remove the **Client Reported** row and use the match.

- The Worker reviews the information shown in the match and selects **Not disputing/new information** to add the RFI to the case.
- The Worker can defer the income if the above option is selected or update the information/amounts in the match.
- The Worker must enter income as zero amount if the income should not appear in the budget. This is a Worker determination.

Income Details: Unemployment Insurance Benefits (UIB) RFI match

The Unemployment Insurance Benefits (UIB) match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for UIB. Remove the **Client Reported** row and use the match.

- The Worker reviews the information shown in the match and selects **Not disputing/new information** to add the RFI to the case.
- The Worker can defer the income if the above option is selected or update the information/amounts in the match.
- The Worker must enter income as zero amount if the income should not appear in the budget. This is a Worker determination.

Income Details: SDX match

The SDX match for Social Security Supplemental Income (SSI) income is brought in from the SDX Clearance system into **Streamline POS Income Details** section.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for SSI income. Remove the **Client Reported** row and use the match**.**

If the match is disputed and documentation satisfies the dispute, the income from the match will not carry over to the budget. If documentation does not satisfy the dispute, the income will be budgeted.

Applicant/participant dispute options:

- Match information is accurate.
- Incorrect amounts.
- No longer receiving benefits.
- Never received benefits.

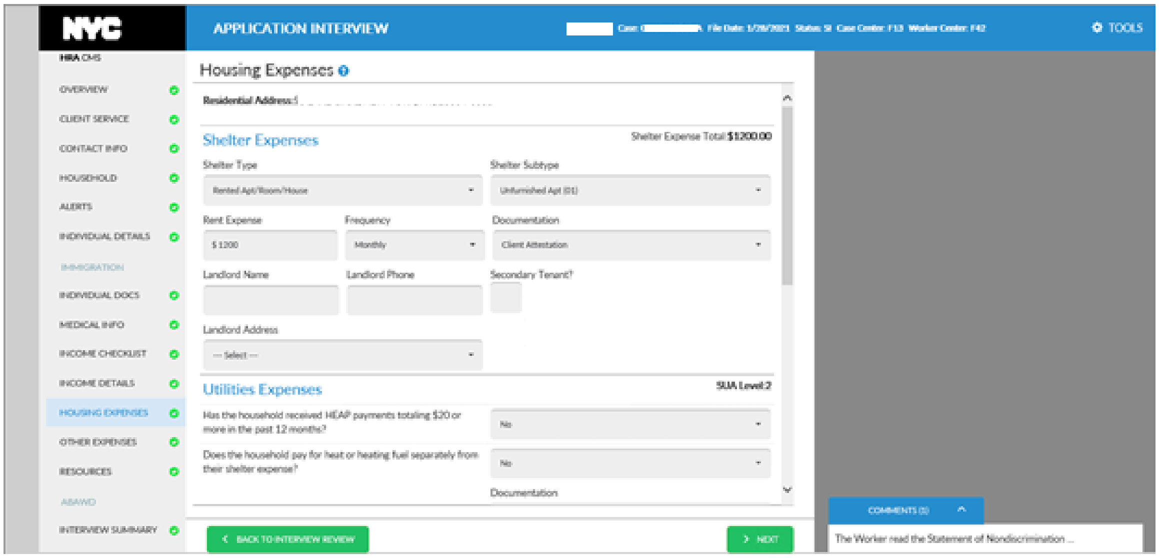
16. Section: Housing Expenses

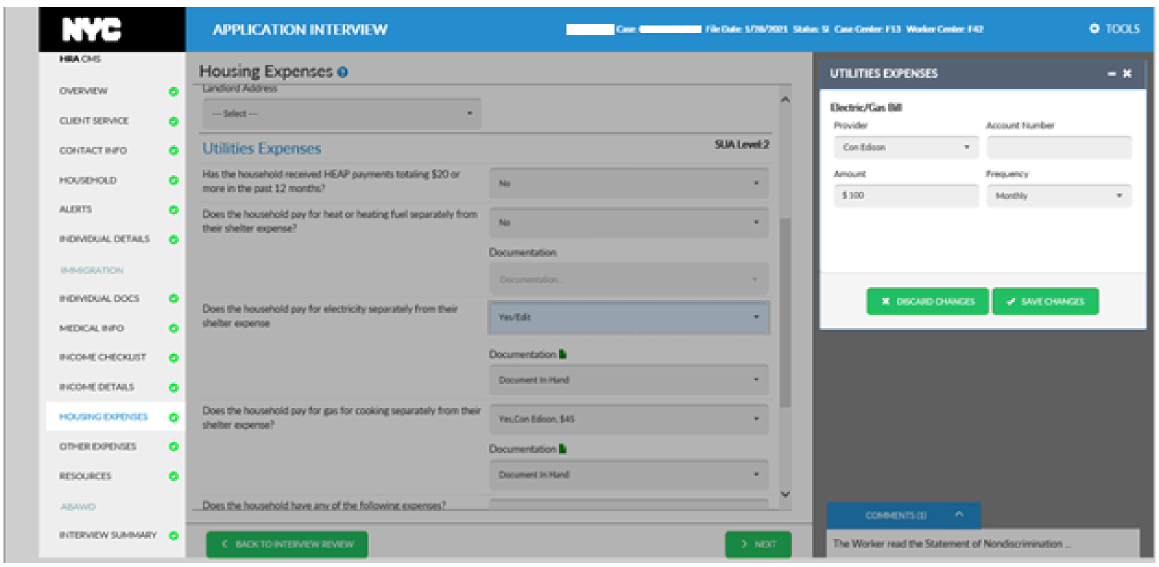
This section captures the shelter and utility expenses for the household. Shelter matches may appear in this section, including New York City Housing Authority (NYCHA) Section 8 and New York City Department of Housing Preservation and Development (HPD) matches. The Home Energy Assistance Program (HEAP), HPD, NYCHA matches run before the page loads. All sections are editable except Shelter Expense Total and Standard Utility Allowance (SUA) Level.

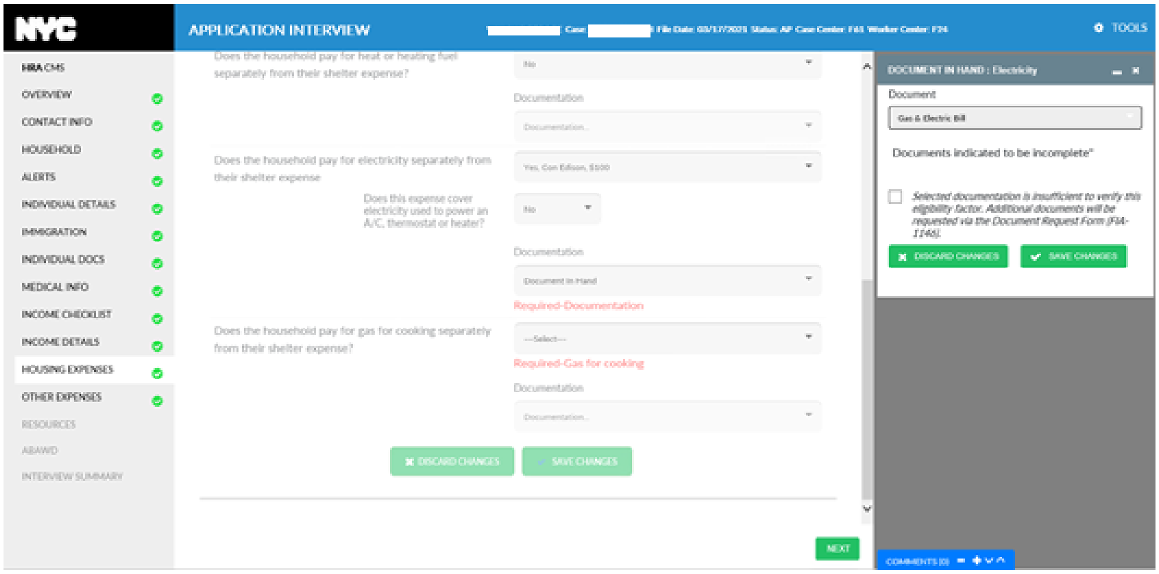
- The Housing expenses screen is divided into the **Shelter Expenses** and **Utilities Expenses** sections. Shelter matches may appear in the right-side panel.
- The Shelter Expenses section displays the following information:
    a. Residential Address – pre-filled from the application
    b. Shelter Expense Total – populates after the recurring shelter expense and frequency have been entered.
    c. Shelter Type – Select an option from the drop-down list.
    d. Shelter Subtype - Select an option from the drop-down list.
    e. Recurring Shelter Expense –Enter the shelter expense.
    f. Frequency – select the frequency from the drop-down list.
    g. Documentation – select the documentation.
    h. Per Night Amt for 1st Person – Appears when the shelter type is Hotel/Motel; Enter the amount.
    i. Per Night Amt for Add’l Person – Appears when the shelter type is Hotel/Motel; Enter the amount.
- Utilities Expenses - displays the following information:
    a. SUA Level – populates as the questions are answered.
    b. Has the household received HEAP payments totaling $20 or more in the past 12 months? – Select **Yes** or **No** from the drop-down list.
    c. Does the household pay for the heat or heating fuel separately from the shelter expense? – Select **Yes/Edit** or **No** from the drop-down list. If **Yes** is selected, the **Detail Entry** panel will open on the right side.
    d. Does the household pay for electricity separately from the shelter expense? Select **Yes/Edit** or **No** from the drop-down list. If **Yes** is selected the **Detail Entry** panel will open on the right side.
    e. Does the household pay for gas for cooking separately from the shelter expense? – Select **Yes/Edit** or **No** from the drop-down list. If **Yes** is selected the **Detail Entry** panel will open on the right side.
    f. Does the household have any of the following expenses? Water, Sewage, Garbage disposal– Select **Yes/Edit** or **No** from the drop-down list. If **Yes** is selected the **Detail Entry** panel will open on the right side.
    g. Documentation - select the documentation for each question answered **Yes**.
    h. Click the **Next** button to continue on to the **Other Expenses** screen.
    i. Click **Back to Interview Review** if done making edits to the interview data to return to the Processor mode.

Streamlined POS Release Notes

Version 4.2, Summer 2021



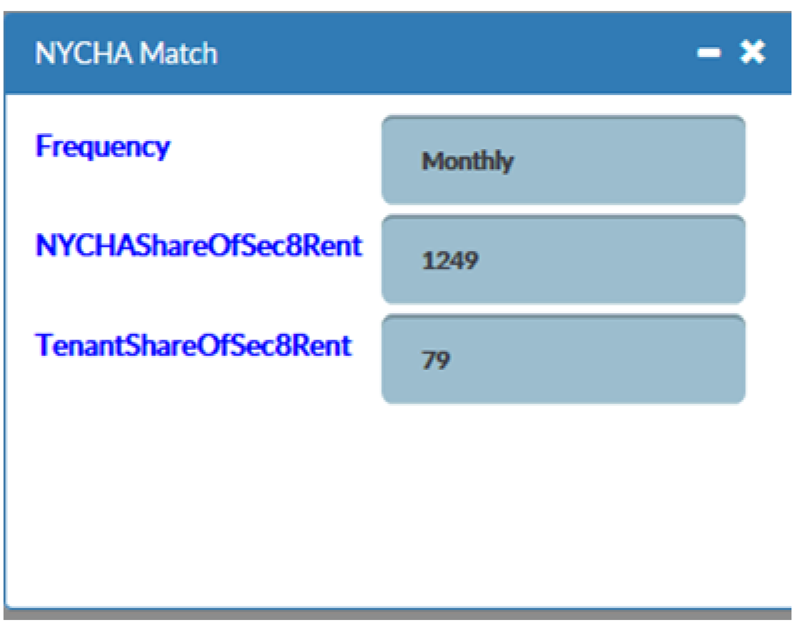




Housing Expenses: NYCHA Section 8 Match
A NYCHA match, if present, will display on the right-side panel of the **Housing Expenses** page. It shows the latest data available from NYCHA which may not be the current information. Remember that shelter expenses for the Supplemental Nutrition Assistance Program (SNAP) can be attested to by the applicant/participant and the **Shelter Expense** section is set to **Client Attestation** by default.

There is no applicant/participant dispute function on a NYCHA Section 8 match, the match is read only when present.

Sample NYCHA match

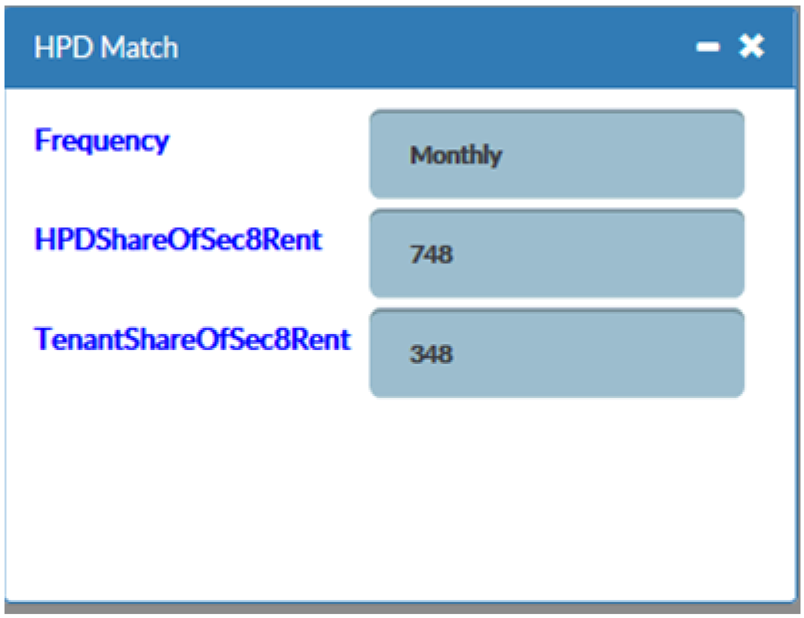


Housing Expense: HPD match

An HPD match, if present, will display on the right-side panel of the **Housing Expenses** page. It shows the latest data available from HPD which may not be the current information. Remember that shelter expenses for SNAP can be attested to by the applicant/participant and the **Shelter Expense** section is set to **Client Attestation** by default.

There is no applicant/participant dispute function on an HPD match, the match is read only when present.

Sample HPD match



17. Section: Other Expenses

This section will capture other expenses for the household, such as medical bills, child support, childcare expenses, dependent care expenses and tuition/education fees. It includes the **Other Expenses Grid** and the **Expense Detail** sections.

- The **Other Expenses** grid displays the following previously reported information:

    a. Household Member
    b. Expense Type
    c. Source
    d. Amount
    e. Remove (checkbox)

- The **Expense Detail** includes the **Default** and **New Expense** views. The **Default** view displays the following:

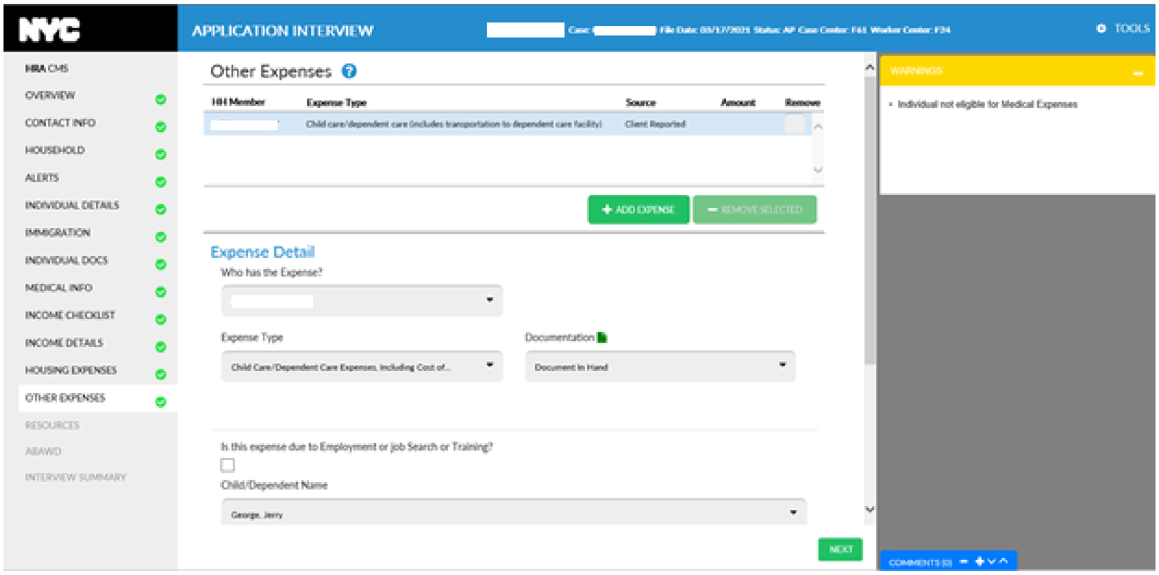
    f. The question: "Does anyone in the household have any of these expenses?" with two possible responses:
        i **No**, none of these apply to any household members.
        ii **Yes**, click **Add Expense** above to add more.
    g. Medical Bills - does not appear as an expense type unless someone on the case has a reported medical issue.
    h. Court-Ordered Child Support
    i. Job- Related Child/Dependent Care Expenses
    j. Court –Ordered Tuition/Education Expenses

- The **Expense Detail** view displays the following:
    a. Who has the expense? - Select a name from the drop-down list.
    b. Expense Type - Select an option from the drop-down list.
    c. Documentation - Select an option from the drop-down list.

  The type of expense selected will determine the data fields displayed.

- Click **Save Changes** when finished entering/editing data.
- Click **Back to Interview Review** if done making edits to the interview data to return to the Processor mode.

Sample of **Other Expenses**



Other Expenses: OCSS child support expense match
The Office of Child Support Services (OCSS) expense match will appear as a row in the top grid in the **Other Expenses** section of Streamline POS if present on the case.

Note: In order to prevent duplication of expenses, please check the expenses reported in the top grid to make sure there is not a **Client Reported** row for child support expense. Remove the **Client Reported** row and use the match.

Streamline POS calculates the amount that should be budgeted.

Budget and dispute logic:

- Match data remains read only.
- Missing data, if any, must be entered by the Worker.
- Selecting Match information is accurate and will bring in the match as is.
- Expense budgeting is calculated/averaged according to current policy.
- If successfully disputed, a data entry section opens, and the Worker can enter an end date or update the income.

Client Dispute options:

- Amounts are incorrect.
- No longer receiving payments,
- Match information is accurate.

Note: In order to successfully dispute the match, select either **Amounts are incorrect** OR **No longer receiving payments**. Select **Document in hand** if you have proof of this, and pick **Document Satisfies Dispute** for the **Dispute Outcome** so that the data entry fields will open for the Worker to update the match.

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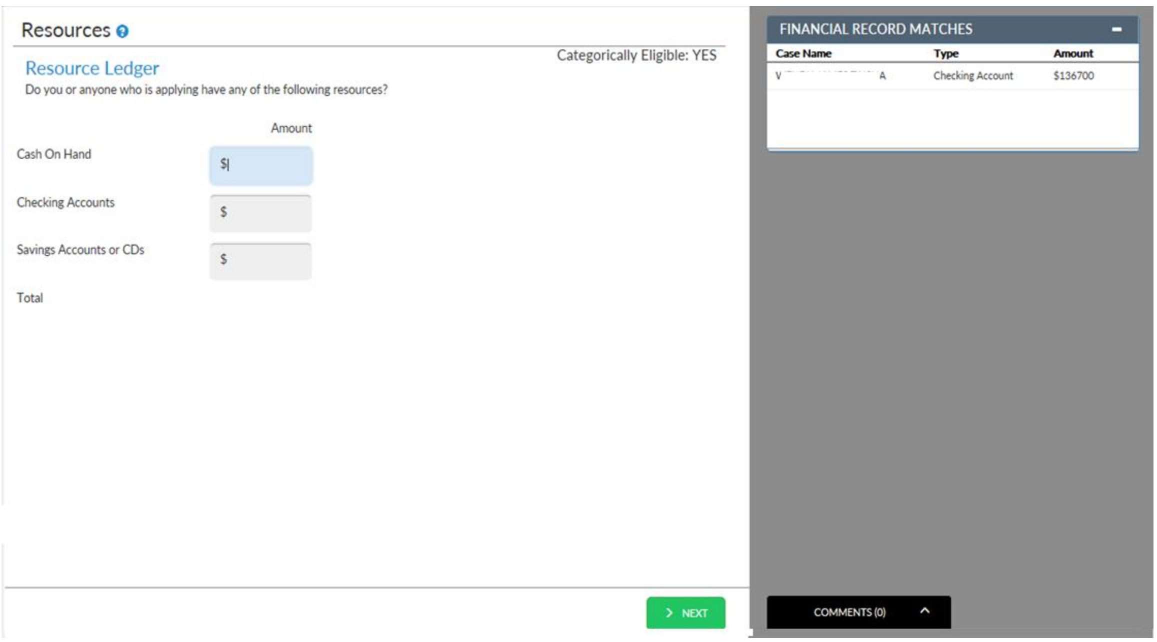
18. Section: Resources

This section captures resource information for the household. The household categorical eligibility for SNAP is determined by the time this section opens. The set of questions shown in the **Resources** section will vary depending on whether the case is categorically eligible or not.

Resources – Categorically Eligible view
If the case is categorically eligible (Categorically Eligible = No) then only three fields will display in the **Resource Ledger** which includes **Cash on hand**, **Checking Accounts and Savings Accounts or CDs** to capture amounts of these resources.

- If none, enter **0**.



Resources – Categorically Not Eligible view

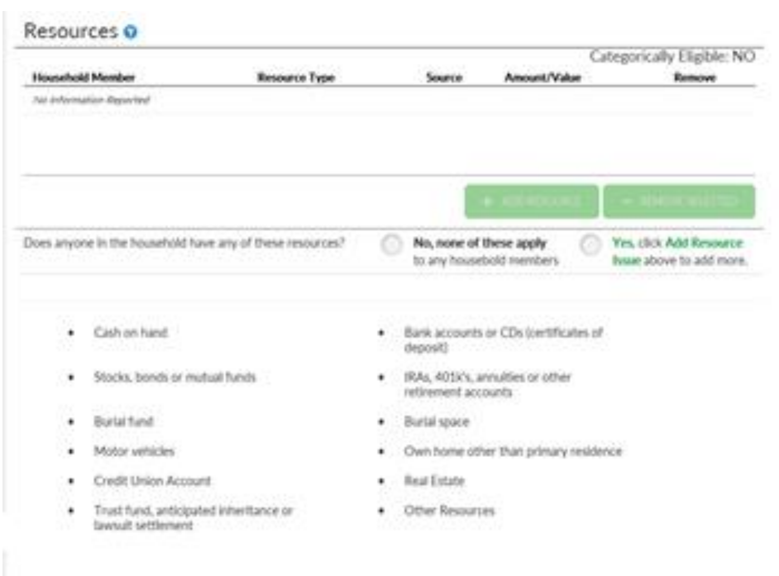
- If the household is deemed categorically ineligible the **Resources Grid** and **Resources Detail** are enabled. The **Resources Grid** displays with the following information:
    a. Household Member
    b. Resource Type – Type of resource (e.g., Savings, Vehicle, etc)
    c. Source – Match or Client Reported
    d. Amount – the value of the resource
    e. Remove (checkbox) – **Note:** A Resource File Integration(RFI) match cannot be removed, and it must be properly resolved in WMS.
- The **Add Resource** button is utilized to add a resource from the list below and the **Remove Selected** button removes a row from the Grid if a checkmark is placed in the Remove checkbox.
- The Non-categorically eligible view of Resources displays the following:
    a. Question: "Does anyone in the household have any of these resources?" With the following possible responses:

i. **No**, none of these apply to any household members.
ii. **Yes**, click **Add Resource** above to add the applicable resources to the case

b. The following list of possible resources displays:

i. Cash on Hand
ii. Bank Account or CDs (Certificates of Deposits)
iii. Stocks, bonds, and mutual funds, Individual Retirement Account (IRA)s, 401Ks, annuities or other retirement accounts
v. Burial funds and burial spaces
vi. Motor vehicles or boats
vii. Own home other than primary residence
viii. Credit union account
ix. Real Estate
x. Trust fund, Anticipated inheritance or lawsuit settlements
xi. Other Resources

- Upon Clicking the **Add Resource** button, the **Resources Detail** displays to add information.
  The main section of the **Resource Detail** section displays the following:
  a. Household Member- Select a name from the drop-down list.
  b. Resource Type - Select a resource option from the drop-down list.
  c. Documentation – Select the documentation for verification of resource.
- The selection of the **Resource Type** will determine what other information will be required to be entered.
- After the required information is entered, click the **Save Changes button**.
- Click **Back to Interview Review** if done making edits to **Interview Data** to return to the **Processor** mode.
- Click the **Next** button to go to the **Interview Summary** screen.

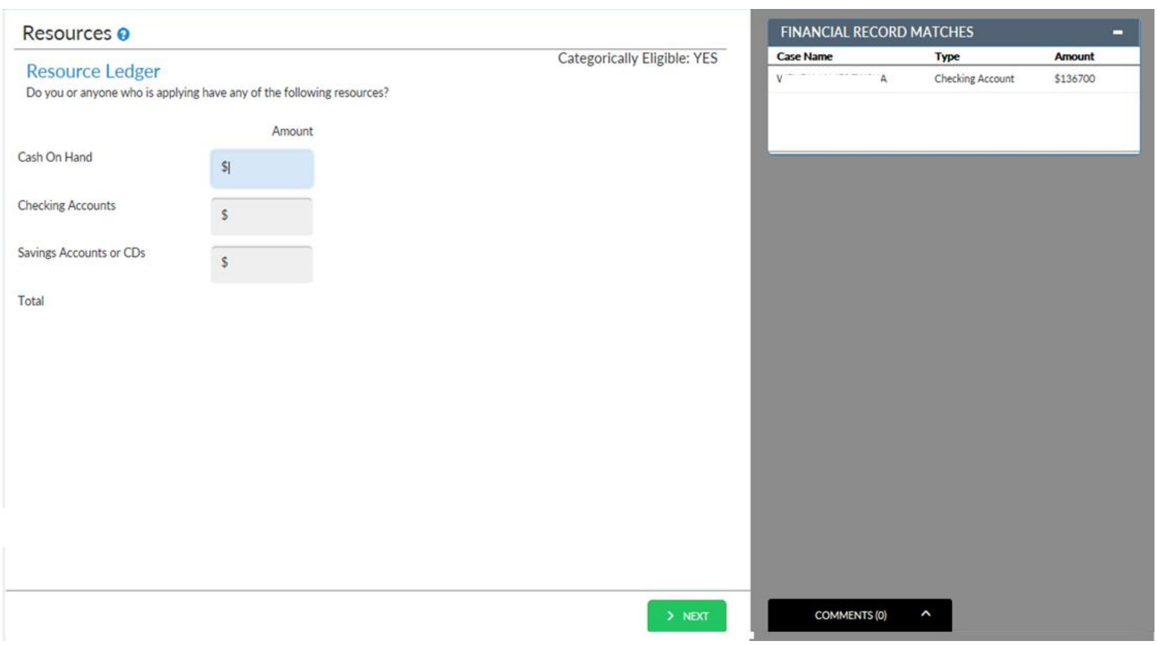


Resources: Bank RFI match

The Bank match will appear in the **Resources** section of SPOS if present on the case.
If the case is categorically eligible the BANK match will appear in the right-side panel.
If the case is not categorically eligible, the BANK match will appear as a row in the top grid.

- The Resource Match: RFI Bank Match displays the following resource match information:
  a. Name – Household member with the match
  b. Resource Type – Type or resource
  c. Value – Amount of the resource
  d. Valuation Date – The date the resource
  e. Other info – Other pertinent information
  f. The RFI hit must be properly resolved in WMS.
- The Match Resolution and Dispute documentation drop down lists are displayed.
  a. Match Resolution – Select an option from the drop-down list.
  b. Dispute Documentation - Select an option from the drop-down list.

Sample screenshot of **BANK Match** on a categorically eligible case.



19. Section: Able Bodied Adult Without Dependents (ABAWD)

The ABAWD screen allows the Worker to mitigate strikes or perform re-establishment of an ABAWD applicant/participant. At the time this release notes were published, this screen is disabled because there is a statewide ABAWD waiver in place.

If the ABAWD tab is enabled on the left-side navigation menu, that indicates there are ABAWD applicants/participants on the case (ABAWD indicator A) who have at least one strike.

The ABAWD screen opens with a grid on the top listing each applicant/participant who meets these conditions.

The ABAWD screen initially just displays the top grid, when clicked on would open three components:

- ABAWD compliance calendar data, which is read only. It shows the ABAWD cycle start date, total strike count, grace period used, grace period months, and ABAWD re-establishment date.
- The **Strike Management** section is where the Worker can mitigate recent strikes if the client has provided documentation to justify the removal of a strike.
- The **Re-establishment** section allows the Worker to re-establish an ABAWD applicant/participant that has fallen out of compliance if the applicant/participant can prove that they are now employed or are engaging in job search related activities. The Re-establishment section appears under the following circumstances:
    - If in the application interview, applicant/participant has three or more strikes
    - If in the recertification interview, applicant/participant has two or more strikes

- The Worker clicks on the row on the grid to see details.

The ABAWD details open, showing the **ABAWD Compliance Calendar Data**. If the person has strikes that are eligible to be mitigated a question "Do you need to update strikes?" Is displayed with **Yes/No**.

- If answered **Yes**, then the **Strike Management** fields open.

- In the **Strike Management** section, the Worker can select the **Strike Month**, select a **Reason for Removal** and enter the **Justification**. The Worker must also select **Documentation**, click **Save Changes** (or **Discard Changes** if a mistake is made).

If the **Re-establishment** section appears, then the Worker will need to fill out the below questions:
In **Recertification Interview** activity.

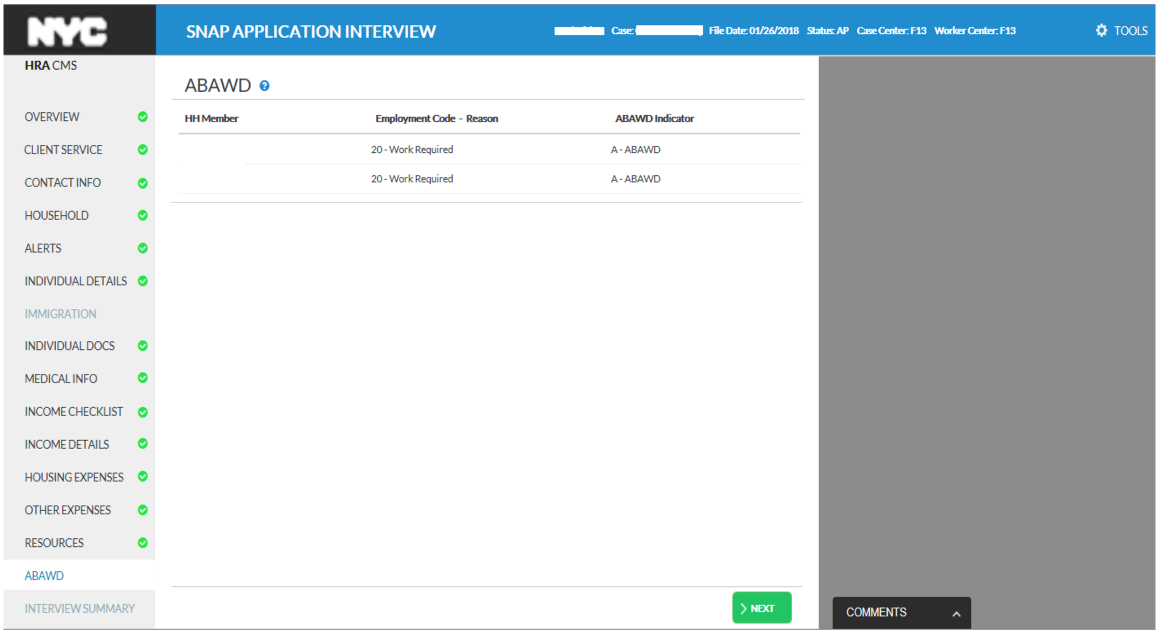
- Have you worked at least 80 hours in a consecutive 30 day period since January 2019? with **Yes/No** dropdown.
- Will you be working 80 hours or more in the next 30 days? with **Yes/No** dropdown.

In the **Application interview**, the same two questions appear as above, along with the additional question "Can you perform a job search for the next 30 days (while application is pending)?" with **Yes/No** dropdown.

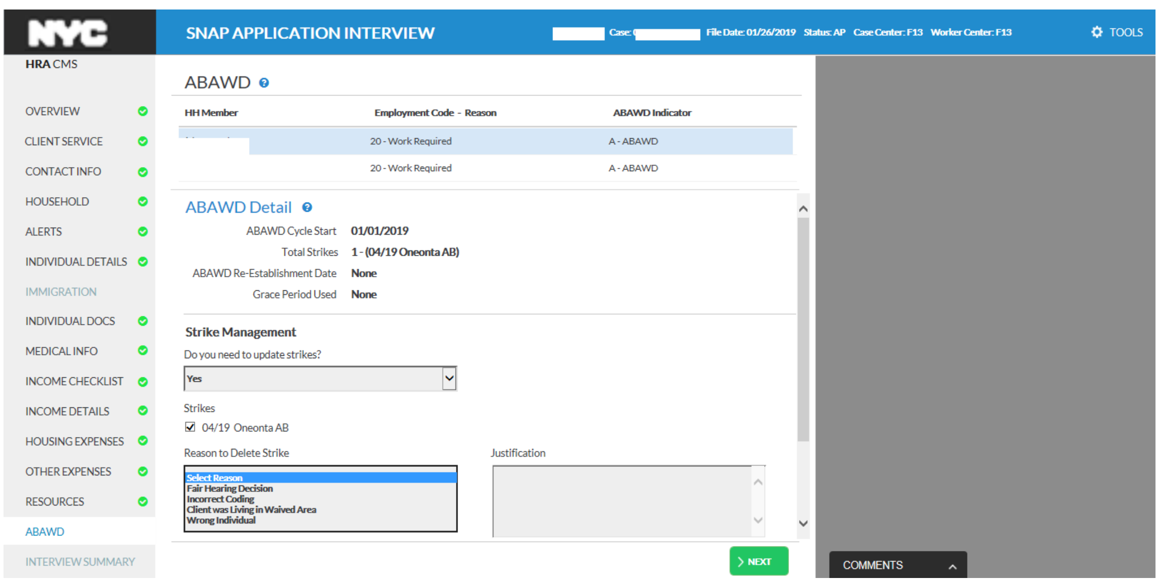
- The Worker must also select **Documentation** in the **Re-establishment** section. **Click Save Changes** (or **Discard Changes** if a mistake is made).

The strike removal or **Re-establishment** will not take effect until the supervisor approves the case and transmits it to WMS.

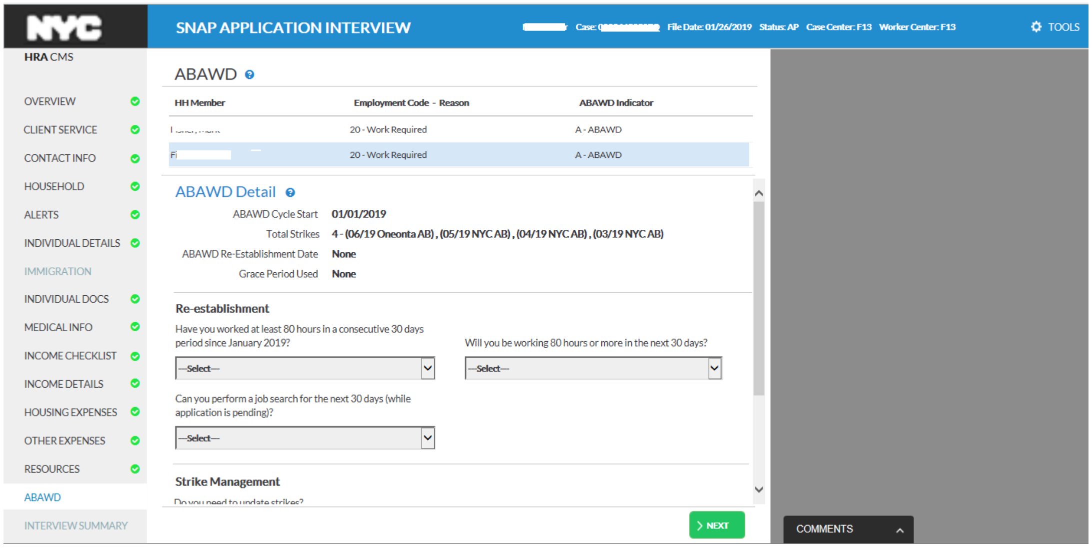
Sample **ABAWD** screens – initial view



Sample **Strike Management** section



Sample Re-establishment section



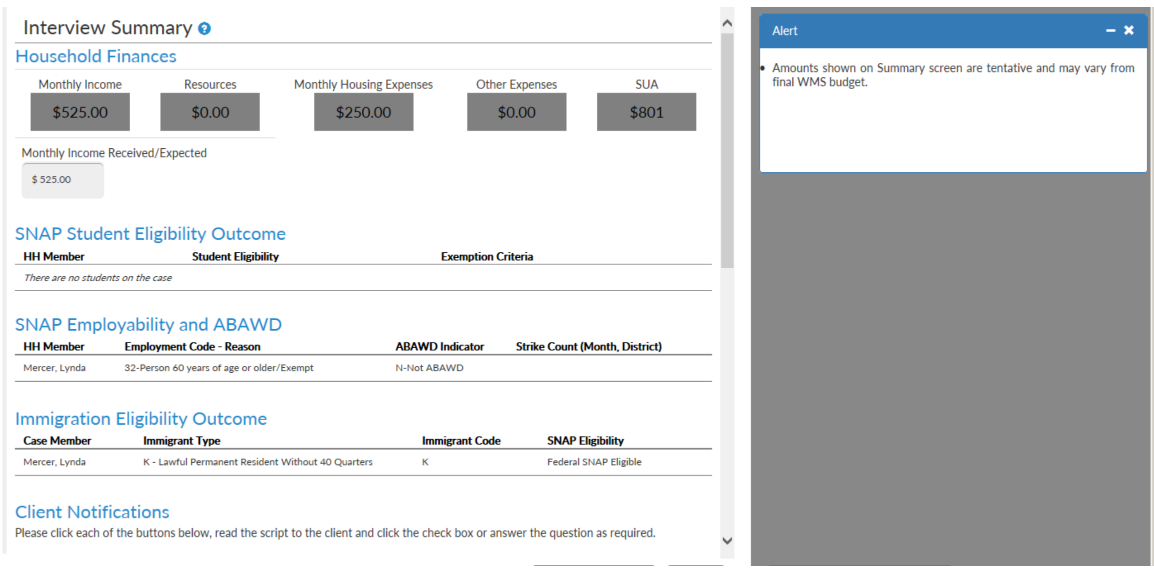
20. Section: Interview Summary

This section provides a high-level summary of the information and follow-up actions for the case. The **Interview Summary** contains the following sections:

- The **Household Finances** section summarizes the following as reported in the interview:
  a. Monthly Income – Amount of household monthly income
  b. Resources – Amount of household resources
  c. Monthly Housing Expenses - Amount of household shelter expenses
  d. Other expenses
  e. SUA Level
  f. Monthly Income Received/Expected – this field only appears in the **Application Interview** activity. It is prefilled with the monthly income calculated by the system. This field is used in *interviewer role only*. In the initial interview, the Worker can change this amount if needed. This value is used in Expedited (ESNAP) eligibility determination.
- SNAP Student Eligibility outcome – shows the household member name, student eligibility outcome and exemption criteria if there are any students in the household. If there are no students, it will show *There are no students on the case.*
- SNAP Employability and ABAWD – shows the household member's name, SNAP Employability code and reason, ABAWD indicator, and strike counts if any for each member of the household.
- Immigration Eligibility Outcome – shows the non-citizen household member's name, the immigration type and Alien Citizenship Indicator (ACI) code, the SNAP eligibility outcome. If there are no non-citizens on the case, then the statement, *There is no immigration information* is displayed.
- Client Notifications area – Non-discrimination statement button. This button opens a modal window for the Worker to read the non-discrimination statement to the applicant/participant. The Worker needs to check that the **Client** was notified to acknowledge the window before closing it. Other buttons may appear here, such as the **Work Requirements** button to be read to applicants/participants who are ABAWD (have ABAWD indicator A (ABAWD/Non-waived area. Individual is 18-49 years of age, does not meet an ABAWD exemption, and lives in a non-waived area. For work-limited individuals (Employability Code 16 or 64), individual is able to work 20 or

more hours per week.). These scripts must be acknowledged at the very bottom the Worker needs to check **Client** was notified before closing the window.

- Print Forms button – opens the **Forms** screen in SPOS. Completing the Forms screen also marks the interview as kept and will have the case go into processor mode.
- Follow-Ups – The **Follow-Ups** grid lists any follow-up tasks that resulted from the interview, specifically: matches that the applicant/participant disputed, and case/line changes that need to be made to other cases before lines on this case can be activated. If a lower-score Medicaid CIN was selected by the system and corrections need to be made to Medicaid's data that would also be a follow-up listed here. The grid has two columns, both **read-only**:
  a. Household Member – Name of household member
  b. Follow-Up Task – Type of follow-up action required.

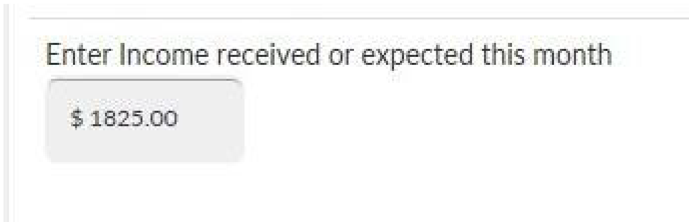


Interview Summary ESNAP related fields/questions – For Interviewers and Separate Determination for One-Shot Deal Applicants only
The **Interview Summary** screen in the **Application Interview** was updated to allow capture of the information required for the ESNAP determination.

These changes include:

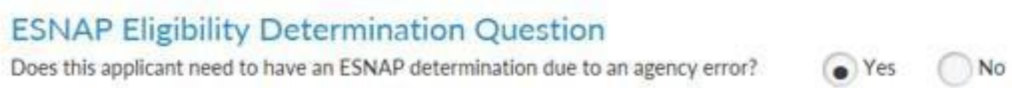
- A question for income received or expected in the month of application.
- A question to determine whether there was agency error or delay when the application interview takes place on the eighth day after the application date or later.

Question for income received or expected in the month of application
A field allows the interviewer to capture the income received or expected in the month of application: Enter income received/expected this month.



Question for late interview to determine whether there was agency error or delay
A question is used to determine whether there was agency error or delay when the application interview takes place on the eighth day after the application date or later:

Does this applicant need to have an ESNAP determination due to an agency error?



- If there was agency error, then SPOS starts the **ESNAP Decision** activity when the Interviewer clicks the **Next** button in the **Interview Summary**.