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POLICY BULLETIN #11-40-SYS
(Obsoletes Fax Flash #11/12)

CA POS RELEASE NOTES VERSION 15.1.1

Date: April 28, 2011	**Subtopic(s):** POS
🖥 This procedure can now be accessed on the FIAweb.	This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on May 2, 2011. Descriptions of the changes can be found in POS Release Notes Version 15.1.1 (**Attachment A**), and Review and Updated Processing of RFI (Resource File Integration) via Open TI Appendix A (**Attachment B**). These release notes can also be found on the HRA Intranet at: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79 *Effective May 2, 2011* **Related Items:** PD #09-43-SYS PB #11-28-OPE **Attachments:**
🖥 Please use Print on Demand to obtain copies of forms.	**Attachment A** POS Release Notes Version 15.1.1 **Attachment B** Review and Updated Processing of RFI via Open TI: Appendix A

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

POS Release Notes
Version 15.1.1 May 2, 2011

These Release Notes contain descriptions of changes in POS Release 15.1.1 scheduled for May 2, 2011. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**.   These and prior Release Notes may also be found on the HRA Intranet at http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Home Visit Needed/Homebound Question Updates

A new temporary process was implemented in March 2011 for applicants/participants who request Home Visit Needed (HVN)/Homebound (HB) status. This temporary process must be used until the forthcoming HVN/HB policy directive is published. For additional details, please see Policy Bulletin (PB) 11-28-OPE Temporary Process for Home Visits Needed/Homebound
 Status Requests.

The POS Medical window and the home visit requested/homebound question were updated accordingly on March 2, 2011 in the following activities:

- CA Application Interview,
- EC - CA Application Interview
- CA Recertification,
- EC - CA Recertification
- CA Change Case Data,
- EC - CA Change Case Data

Revision to Medical Window
The question for home visit needed/homebound will be updated in the Medical window:

- **Is any adult in the household homebound or requesting a home visit?**

Updated Medical Window

When the Worker clicks **'Yes'** for the 'Is any adult in the household homebound or requesting a home visit', POS will open the revised response to question window listed below:

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Revised Response to Question Window

If the individual was already identified as homebound under the prior process and has the homebound Action Code **192H** (Homebound Individual/Unassignable) in NYCWAY, POS will display the prior version of the window for the individual. Individuals with Action Code **192H** must be re-evaluated at recertification.

Response Window with previous answer of "Yes" for "Did the applicant/participant submit documentation to support a homebound status"

Removal Edits

The Worker will be prevented from changing the homebound status in the following instances:

- The Home Visit Needed/Homebound question was answered yes and the Worker is attempting to change it to No.
- The Worker is attempting to delete a line for which the home visit request was saved in a previous activity.

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The worker will receive the following error message, **"The homebound indicator can only be removed by designated FIA staff".**

Posting Action Codes to NYCWAY for Home Visit Requests

When an individual applying for ongoing assistance, case categories **FA** (Family Assistance), **SNCA** (Safety Net Cash Assistance), **SNNC** (Safety Net Non-Cash Assistance) or **SNFP** (Safety Net Federally Participating Non-Cash Assistance) makes a request for a home visit or homebound status, POS will post action code **192P (**HVN/HB Status Request Pending Documentation**)** to NYCWAY. If the individual is already marked as homebound with Action Code **192H Homebound individual**, NYCWAY will not allow the posting of the **192P** code.

When an individual applying for one-time emergency assistance only, case categories **EAF** (Emergency Assistance to Families), **EAA** (Emergency Assistance for Adults) or **E-SN** (Emergency Safety Net), makes a request for a home visit or homebound status, POS will post action code **192S HVN/HB SI Request Pending Documentation** to NYCWAY. If the individual is already marked as homebound with action code **192H**, NYCWAY will not allow the posting of the 192P code.

Re-evaluation of currently homebound individuals at recertification

For individuals who are currently marked as homebound with action code **192H**, the homebound status will be reviewed at the recertification. For these individuals, POS will post action code **192J-HVN/HB Close Out Code**. This action code will close the existing **192H** code and will auto-post action code **192P** to start the re-evaluation process. Staff should follow the process in PB 11-28-OPE Temporary Process for Home Visits Needed/Homebound Status Requests for these re-evaluations.

Outcomes on Home Visit Requests

Under this temporary process, outcomes from CAS and OLA reviews for home visit requests will be entered by FIA central office staff.

Denied Home Visit Requests

After a denial of a home visit request is entered, NYCWAY will send the decision to POS via a nightly automated data exchange as follows:

- POS will change the answer for the question **"Is any Adult in the household homebound or requesting a home visit?"** if all home visit requests were denied for the household.
- POS will remove the individual from the response window for the question **"Is any Adult in the household homebound or requesting a home visit?"** if any other individual in the household still has a pending or approved home visit request.

Approval window

The supervisory approval window has been updated for the question **"Is any Adult in the household homebound or requesting a home visit?"** In addition a supervisory approval is required for the following question, **"Did the applicant/participant submit document to support a homebound status?"**

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Supervisory Approval for "Is Any Adult in the Household Homebound or requesting a home visit"

Appointment Edits for 'Schedule CA Recertification Appointment' activity

The Schedule CA Recertification Appointment activity was updated effective March 2, 2011 to add the new home visit action code **192P** in the edits that prevent the Worker from scheduling an in-office appointment for an individual who is marked as "home visit needed" or "homebound" in POS or NYCWAY.

The edits for the **W-908CC** (Rescheduled Recertification Appointment Notice) were also updated to add the new home visit action code **192P** in the edits that prevent the Worker from scheduling an in-office appointment for an individual who is marked as "home visit needed" or "homebound" in POS or NYCWAY.

Appointment Edits for M-3g, W-113K and W-186D Forms

The edits for the **M-3g**-(Notice to Report to Center), **W-113K**- (Documentation Requirements) and/or Assessment Follow-Up and **W-186D**-Fair Hearing Compliance Request forms were also updated to add the new home visit action code **192P** in the edits that prevent the Worker from scheduling an in-office appointment for an individual who is marked as "home visit needed" or "homebound" in POS or NYCWAY.

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2. BEV Referral Updates

The BEV Referral window will update with a revised interface for in-office appointments and to add the **BEV-100** (Notice of Real Property Ownership Appointment Referral to the Bureau of Eligibility Verification) notice.

Revised BEV Schedule Appointment Window for In-Office Appointments
The **BEV Schedule Appointment Window** has been updated to reflect a revised interface for in-office appointment. The window will show the earliest appointment available from the MAPPER system. The following instructions will be listed on top of the appointment window:

"The earliest available appointment is listed below. To select this appointment, click on the Schedule/Reschedule the Appointment' button.

If the applicant requests a different appointment date and time, click on the 'Change Appointment' radio button, enter the requested date and time and click on the Schedule/ Reschedule the Appointment' button.

To exit the window without scheduling or rescheduling an appointment, click Cancel."

Available Appointments window (Primary Appointment Selected)

To select a different appointment date, the Worker must select the Change appointment option, type the requested date in the **Date** field and click on the Time drop down menu. If there are available time slots for the entered date, the Worker must select the time.

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If there are no available time slots, the following error message will appear.

Available Appointments window (Change appointment Selected)

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Window for Field Visit and Payee Appointments

The window to schedule a field visit appointment or payee appointment will not be changed.

BEV Real Property Ownership Appointment

FIA staff will no longer need to access MAPPER to print the Notice of Real Property Ownership Appointment Referral to BEV (**BEV-100**). The **BEV-100** form is now available in POS and must be printed whenever an appointment to the real property assessment unit is required.

When scheduling a BEV appointment for an applicant, if the applicant is known to have had real property, the BEV appointment populates with the BEV referral reason code **35** (Evidence of Real Property Ownership). This code exists to indicate when an applicant is the owner of real property and/or the applicant reapplies after failing to comply with a real property issue or failed to sign the required documents from a previous BEV interview.

When the applicant reports ownership of real property, the BEV appointment populates a code **35** on the BEV Appointment screen in POS. If code **35** is present from a previous appointment, POS will carry it over to the new appointment.

The appropriate BEV eligibility appointment notice will print for the applicant:

- Form **W-523R** for field visit appointments;
- Form **W-593Y** for in-office appointments for the East River Job Center (**037**); and
- Form **W-532R** for in-office appointments for all other Job Centers

BEV staff will be aware of the need for a real property assessment interview once the code **35** is transmitted by MAPPER BEV into the Automated Listing of Eligibility Requirements Tracking System (ALERTS). BEV staff will send the applicant to the real property assessment unit after the initial BEV interview is completed.

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3. Updated RFI Processing Windows

The Resource File Integration process has been updated to display two new processing windows, **RFI Comments and RFI Supervisory Approval Window.**

RFI Comments Window

When a RFI match results in income that is not budgeted on the case, the worker must include a detailed case comment that supports this case action. The window will provide instructions to how to proceed to process the RFI match. If the income is not calculated, saved and authorized on the budget, the worker will need to enter a detailed comment pertaining to this RFI action. A new comment window had been added to enter a detailed description as to why the income is being disregarded for budgeting purposes.

The following Instruction will be displayed at the top of the **Comments** window:

"RFI- WRS, UIB or New Hires match data was received on this case but income does not appear on the budget you selected to authorize on the TAD. If the income was not entered on the budget in error please select **Return to the Budget** window' and calculate a new budget. If the income should not be budgeted you must enter a detailed explanation in the Comments section of this window"

RFI Comments Window

Revised RFI Supervisory Approval Window

Supervisors will now approve/disapprove the RFI matches on a new window which has detailed instruction on processing the RFI match

To approve the RFI entries, the Supervisor will click on the **Approval Status** menu option. The New Supervisory Approval window will appear.

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The following instructions will be displayed on the New **RFI Approval** Window:

*"*Please review all RFI resolution codes prior to approving a case. If message "Supervisory override necessary before case can be accepted" appears, than you have to enter resolution code **P90** before case is to be accepted. Do not approve any cases that still have unresolved RFI data.*"*

RFI Supervisory Approval Window

For detailed instruction on the RFI process and the updates please read Appendix A, RFI Review and Updated Processing, Version 15.1.1.

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4. Active Childcare Provider Updates

The ACCIS system has been updated to reflect the provider's enrollment Information. To correspond with this new information POS will display the ACCIS Clearance window with the provider's enrollment information. The enrollment information will include the following:

- Date provider activated in ACCIS
- Number of Children enrolled with the provider
- Detail Button (details will include the Children's information)

Updated ACCIS Window

New Details Window

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Additional updates to the Clearance window include the following sentences:

- Is the Applicant/Participant disputing this Match?
- Is the Applicant/Participant claiming that he or she is no longer providing childcare?

Workers will be able to identify the child(ren) that are being provided childcare for by those providers who are applying for or receiving ongoing assistance.

Supervisory Approval Window

The supervisory approval window has been added for approval purposes. In addition, the supervisor will be able to view the worker's saved details.

5. Addition of Caseload in Application Registration/Modification

All Cash Assistance Job Centers will be allowed to access update unit worker field but only 3 sites are allowed to enter options other than the new selection being added, **"IBOOK"** which is to be used for situations where the applicant states that they cannot stay for a same day interview.

The 'Unit Worker' dropdown will contain 'IBOOK' as an option for all Cash Assistance Job Centers. This change does not extend to HASA and SEP DET caseloads, which will remain uneditable.

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Visual Object for Updating Unit Worker

The following new error message has been added when an applicant has been identified as not staying for same day interview:

▪ "You may only select the value **'IBOOK'** in the Unit Worker field"

Workers at Job Centers other than Center **018 (Housing Program Center), 037 (East River) and 080 (Special Project Job Center)** are only allowed to select the value "IBOOK" from the Unit Worker menu. If any selection other than "IBOOK" is selected, POS will display the following error message:

▪ "You may only select the value **'IBOOK'** in the Unit Worker field if the **'Cannot Stay for Same Day Interview'** checkbox is selected in the Site Determination window."

6. Mandated Printing of Applicant & Participant Task List

The applicant & participant task list will be required to print when the worker has answered the Task List question **Yes** in the **Pre-Referrals** window and has processed the data entry window associated with this form. The forms will be removed from the error processing activity. The following edits have been added to process cases that are being activated or for on-going assistance cases when the individual is not present.

Applicant Task List Form-W680F
"The data entry window for form W-680F was completed. The form has to be printed when the data entry window is completed. You cannot complete the case without printing the form. If the form is not required, please change the answer for the Applicant's Task List to No in the Pre-Referrals window."

Participant Task List Form-W680W
"The data entry window for form W-680W was completed. The form has to be printed when the data entry window is completed. You cannot complete the case without printing the form. If the form is not required, please change the answer for the Participant's Task List to No in the Pre-Referrals window."

7. SCR Notice Selection Window Updates

POS will now recheck the following forms located on the Notice Selection window in the designated SCR sites:

- **LDSS-4013**, Action Taken on Your Application
- **LDSS-4753**, Food Stamps request for Contact/Missed Interview
- **M-3g**, Notice to Report to the Center
- **W-102**, Notification to Participant of new Worker
- **W-186C**, Fair hearing Compliance Statement
- **W-636**, Notice Of Special Grant

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If one of the forms were previously marked **Y** (YES in the print queue) but the data entry window has an answer of **N** (No) , then POS will change the outcome to **N** (No in the print queue).to prevent the unnecessary printing of blank forms.

The benefit issuance and recoupment forms will also be checked if marked previously with a **Y** (Yes in the print queue) but there is now no data for the form, POS will change the outcome to **N** (No in the print queue).to prevent the unnecessary printing of blank forms.

The rechecking of the forms will be processed during the following activities:

- CA Application Interview
- EC - CA Application Interview
- CA Recertification Interview
- EC - CA Recertification Interview
- CA Change Case Data
- EC- CA Change case Data
- Non-Food Emergency
- EC - Non-Food Emergency

8. Updates in the Shelter/Housing Expense window

Due to a change in vendors, all references to **"Keyspan"** have been removed and be replaced with a new vendor named "**Natl Grid".** The updates will be done in the Response to Question heating bill window, and the electric/gas window for CA POS. (and FS POS.)

9. Single Issuance Update

The Single Issuance Task 7 restrictions have been updated to reflect the utility name change from Keyspan to National Grid. The utility restriction will reflect this addition of the new vendor 'National Grid".

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10. Update to Food Stamp Look-up Window

An update to the POS **FS Look-up** window has been created to allow the worker to input FS benefits found manually outside of POS. In some instances the system does not find the FS benefit issued to the individual during a system query. Manually the worker may find that the individual already received FS benefits for the month in question by looking at WMS or on an outside NYC work list.

POS will now provide a space for the worker to enter their findings for the correct processing of FS benefits.

Revised window: No FS issuance found by automated lookup, worker finds FS benefits outside NYC

Revised window: No FS issuance found by automated lookup, worker finds FS benefits in NYC

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11. E-Form Updates

The following forms will be removed from POS:

- Form **W-M42v**- Medicaid Choice Managed Care Referral
- Form **W-146F**-Request for Emergency Housing to Service Section Supervisor
- Form **W-166N** -Verification of Ownership of Premises
- Form **W-204R**-Mandatory Dispute Resolution (MDR) Summary
- Form **W-681**-Request for Marriage/Divorce Verification from Agencies Outside NYC
- Form **W-701**-Request for Birth or Death Verification from New York City Department of Health

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Review and Updated Processing of RFI via Open TI
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Overview

Resource File Integration (RFI) is a subsystem of the Welfare Management System (WMS) which communicates with the following interfaces to identify the financial resources of CA, FS, and/or MA applicants/participants:

- New York State (NYS) Department of Taxation and Finance Wage Reporting System (WRS) for employment income;
- NYS Department of Labor Unemployment Insurance Benefit (UIB) file for unemployment benefits;
- Social Security Administration (SSA) for Retirement, Survivor, and Disability Insurance (RSDI) benefits;
- New York State Department of Taxation and Finance for newly hired or rehired employees of the state (HIRE);
- Participating NYS banks for checking and savings account information; and
- Financial Institution Recipient Match (FIRM) for trust fund and escrow account information.

In addition, RFI also verifies the Social Security Number (SSN), name and date of birth of applicants/participants through the SSA interface.

When demographic information is changed in WMS, an RFI inquiry is automatically generated on the case. Staff will be alerted to an unresolved RFI match with a message on the following:

- Paperless Office System (POS) Household screen;
- POS Turn-Around Document (TAD); and
- WMS Case Composition – Suffix/Individual Summary screen.

New functionality will be added in POS to allow the Worker to review the RFI information in the interview activities.

Household Screen with Updated Tool Bar

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Accessing RFI Data
A new **WMS RFI Data** icon will retrieve the RFI data from WMS via Open TI (Open Transaction Integrator) and will display them in a new window.

WMS RFI Data Icon
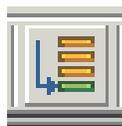
This new icon will replace the existing WRS, Bank, SSA, New Hire and Bank icons in the tool bar.

The Worker can also access the RFI window by clicking on **Tools** and selecting **RFI** in the menu bar.

The RFI data will be available in the following Worker interview and change action activities:

- CA Application Interview
- CA Change Case Data
- CA Recertification Interview
- EC - Application Interview
- EC - Change Case Data
- EC - Recertification Interview
- EC - FS Separate Determination – Eligibility Decision
- FS Separate Determination – Eligibility Decision
- IN/EFS Issuance (CA/FS Case)

The RFI data will be available in the following approval activities:

- Approve CA Case Action
- Approve CA Eligibility Decision
- Approve CA Recertification
- Approve EC - CA Application Interview
- Approve EC - CA Change Case Data
- Approve EC - CA Recertification
- Approve FS Separate Determination – Eligibility Decision
- Approve IN/EFS (CA/FS Case)

The RFI data will also be available in the Review Case activity.

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RFI Case List Window

POS will initially display the **RFI Case List** window. This window presents the latest RFI Case List, displaying a value for each RFI category, with code indicating the RFI status of each applicant/participant.

There will be two tabs. By default, the **UNRESOLVED** tab will be selected, with options for the Summary and the unresolved RFI categories. The Worker can click on the **ALL RFI DATA** tab to view the details for each RFI category.

To view the detailed RFI details, the Worker must click on the link for each category:

Example: Unresolved New Hire RFI

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The system will display the details of the unresolved RFI and instructions:

Example: New Hires Match Information

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Resolving RFI Data

RFI status codes **U** (Unresolved RFI data) and **W** (Unresolved RFI data due to problem with SSN) represent RFI hits that must be investigated and resolved before the case can be activated in Active (**AC**) status.

The Worker will be able to update the status code for any RFI category with a value of **U**. The Worker will also be able to remove or update mistaken entries in the resolution code.

To resolve the RFI, the Worker must select the appropriate resolution code and click on the **Update** button to submit the resolution code to WMS.

Resolution options for SSA RFI window

Radio button description	Resolution Code transmitted to WMS
Social Security Data Reviewed.	P01
Case or individual rejected, related to RFI.	P03
Case or individual rejected, not related to RFI.	P04
RFI hit data doesn't affect eligibility	P05
RFI Individual not the same as client.	P06
Income revealed by RFI budgeted	P07
Referred to FEDS/BFI	P08

Resolution options for WRS, UIB, Bank and New Hire RFI windows

Radio button description	Resolution Code transmitted to WMS
Case or individual rejected, related to RFI.	P03
Case or individual rejected, not related to RFI.	P04
RFI hit data doesn't affect eligibility	P05
RFI Individual not the same as client.	P06
Income revealed by RFI budgeted	P07
Referred to FEDS/BFI	P08

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Resolving RFI Income Matches

If there is income information, the Worker must review the income and/or resource information on the screen to determine if the match affects CA and/or FS eligibility.

If the information is pertaining to income that has not been documented, send the applicant/participant one of the following forms requesting verification of the information found in the match (e.g., award letters [SSA, UIB] or pay stubs/employer letter [employment]) using the Notice to Report to Center (**M-3g**).

If the applicant/participant verifies income and the household remains eligible, the Worker must select the resolution "Income revealed by RFI budgeted" and click on the **Update** button. POS will transmit Resolution Code **P07** and WMS will update the RFI Status Code to **R**. (Resolved RFI Data). The Worker must calculate, save, and authorize a new budget that includes the verified income.

Addition of the RFI Comment Window

If the income is not calculated, saved and authorized on the budget, the worker will need to enter a detailed comment pertaining to this RFI action. A new comment window had been added to enter a detailed description as to why the income is being disregarded for budgeting purposes.

 The following Instruction will be displayed at the top of the **Comments** window.

"RFI- WRS, UIB or New Hires match data was received on this case but income does not appear on the budget you selected to authorize on the TAD. If the income was not entered on the budget in error please select 'Return to the Budget Window' and calculate a new budget. If the income should not be budgeted you must enter a detailed explanation in the Comments section of this window"

RFI Comments Window

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If the applicant/participant verifies income that makes the household ineligible for CA and/or FS, the Worker must select the resolution "Case or individual rejected, not related to RFI" and click on the **Update** button. POS will transmit Resolution Code **P04**. The Worker must close the case using one of the following income related codes:

- **E30** Excess Earned Income (Wage, HIRE RFI hit)
- **E35** Excess Unearned Income (UIB,SSA RFI hit)

Resolving RFI Resource Matches

If there is resource information, the Worker must review the income and/or resource information on the screen to determine if the match affects CA and/or FS eligibility.

If the applicant/participant responds and submits documentation which supports a dollar amount above a resource limit, the Worker must select the resolution "Case or individual rejected, not related to RFI" and click on the **Update** button. POS will transmit Resolution Code **P04**. The Worker must reject/close the CA case using CA closing code **U40** (Excess Resources)

If the applicant/participant responds but is unable to provide documentation of the account(s), the Worker must send the Bank Inquiry and Clearance Report (**LDSS-760**) form to the financial institution. If the financial institution returns documentation which supports a dollar amount above the resource limit, proceed as indicated above.

If the information is pertaining to a resource such as bank/FIRM matches and the amounts do not exceed the resource limits, the Worker must select the resolution "RFI hit data doesn't affect eligibility" and click on the **Update** button. POS will transmit Resolution Code **P05** and WMS will update the RFI Status Code to **R**.

Resolving Incorrect RFI Information

If the participant responds providing documentation proving that the RFI information is incorrect, the Worker must select the resolution "RFI Individual not the same as client" and click on the **Update** button. POS will transmit Resolution Code **P06** and WMS will update the RFI Status Code to **R**.

Failure to Respond

If the participant does not respond, the Worker must select the resolution "Case or individual rejected, related to RFI" and click on the **Update** button. POS will transmit resolution code **P03**. The Worker will then close the CA case using code **V20** (Failure to Provide Verification).

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Issue under Investigation

If documents are present which indicate that the issue is currently under investigation by the Bureau of Fraud Investigation (BFI) or the Investigation, Revenue and Enforcement Administration (IREA), select the resolution reason of "Referred to FEDS/BFI" and click on the **Update** button. POS will transmit Resolution Code **P08** and WMS will keep the RFI Status Code in U. The Worker will then take no further RFI related action on the case until the investigation is complete.

Other Issues

For all other issues, the Worker must check the HRA Viewer for scanned documents related to the RFI hit. If documents are present that confirm the issue was resolved, select the resolution "RFI hit data doesn't affect eligibility" and click on the **Update** button. POS will transmit Resolution Code **P05** and WMS will update the RFI Status Code to **R**. No further RFI related action is required.

The Worker must document in the applicant/participant's case record whether his/her eligibility was affected by the RFI match and whether any resolution actions were taken. The record must indicate the additional resource information disclosed on the WMS RFI screens that changed the eligibility of the participant.

Example: Resolution options for WRS RFI for Worker

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Changing the Resolution Code

To change the resolution code, the Worker must click on the <u>Change</u> link, select a new resolution code and click on the <u>Update</u> link. POS will transmit a "#" (pound) sign to WMS to remove the existing resolution and will then submit the new resolution code.

If the RFI was mistakenly marked as resolved, the Worker will have an option to remove the resolution code by clicking on the <u>Change</u> link, selecting "Remove Resolution Code" and clicking on the <u>Update</u> link. POS will transmit a "#" (pound) sign to WMS to remove the resolution code.

Activity Completion Edits in CA Application Interview and CA Change Case Data

In the CA Application Interview and CA Change Case Data activities, POS will confirm whether there is unresolved RFI data for application cases that will be **AC** for Cash Assistance (**CA**). If unresolved RFI data exists, POS will display the following error message in the **Activity Completion** window:

▪ Unresolved RFI data on the CA application case must be resolved prior to completion

Activity Completion Edit in CA Recertification Interview

In the CA Recertification Interview, POS will confirm whether there is unresolved RFI data for cases that will continue AC for CA. If unresolved RFI data exists, POS will display the following error message in the **Activity Completion** window:

▪ Unresolved RFI data on the CA recertification case must be resolved prior to completion

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Approval Window for RFI

A new window will allow the Supervisor to review the RFI data and approve or disapprove the Worker's entries. To approve the RFI entries, the Supervisor will click on the **Approval Status** menu option. The New Supervisory Approval window will appear.

The following instruction will be displayed on the revised **RFI Approval** Window:

"Please review all RFI resolution codes prior to approving a case. If message "Supervisory override necessary before case can be accepted" appears, than you have to enter resolution code P90 before case is to be accepted. Do not approve any cases that still have unresolved RFI data."

The Supervisor must click on the **Open RFI Match Window** button to view the detailed RFI data. Once the window is reviewed and approved/disapproved, the Supervisor must click on the **Next** button to continue the approval activity.

POS Release Notes Appendix A
Review and Updated Processing of RFI via Open TI
Version 15.1.1 May 2, 2011

RFI Match Window

Approval Status Window

Supervisory Override

The Supervisor will also be able to override RFI data with a status code of **W** or status code **U** and Resolution Code **P08** when required for emergency cases using the resolution of Override RFI Information. POS will transmit Resolution Code **P90** and WMS will update the RFI Status Code to **R**.

In order to post this override the Supervisor must TTSS Bit **193** on their WMS ID. This special right can be request via the APART system.