



OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #17-89 SYS

SNAP POS RELEASE NOTES VERSION 11.3

Date: October 24, 2017	Subtopic(s): POS
	<p>This policy bulletin is to inform Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff that the latest version of the Paperless Office System (POS) has migrated into production on October 23, 2017. Descriptions of the changes can be found in SNAP POS Release Notes Version 11.3 (Attachment A) and Centralized Web UIT SNAP (Attachment B).</p> <p>These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</p> <p><i>Effective Immediately</i></p> <p>Attachments:</p> <p>Attachment A SNAP POS Release Notes Version 11.3 Attachment B Centralized Web UIT SNAP</p>

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

SNAP POS Release Notes

Version 11.3 October 23, 2017

These Release Notes contain descriptions of changes in Supplemental Nutritional Assistance program,(SNAP) POS Release 11.3 scheduled for Monday, October 23, 2017. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. These and prior Release Notes also be found on the HRA Intranet at <http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

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1. New HRA Express Center 050

To improve customer service and to decrease the amount of time that a participant has to stay in a location, FIA (Family Independence Administration) has created an Express Center. The new center is HRA Express East New York (Center **050**) located at 404 Pine Street. Center **050** will open October 30th, 2017. The center will offer all applicants and participants quick Self-Service access and assistance. The applicant/participants will be allowed access to services and benefits in multiple settings. Technology will be maximized for greater access within centers and partner locations. There will be online and phone virtual services. The services will be aligned for client interactions across all programs.

The screenshot shows the 'Paperless Office System - [Household Screen]' interface. The top bar indicates the time is 9:37:52 AM on Friday, October 06, 2017. The main area contains several sections:

- Control Information:** District: 66, Center: Hunts Point Job Center, Worker: [blank], Case Number: [blank]
- Present Address:** Street Number, Direction (None), Name, Type, Apt #, City, State, Zip Code.
- Suffix Information:** Active (selected), Applying (deselected), No FS IPV or Sanction Found. SNAP Suffix: 1, SNAP Status: AC. A table shows details for two suffixes:

Suff	Case Name	Cat	Stat	# AC	Stat	# AC	Monthly Rent	Actual Rent (Less Any Contributions)	PA H/H RENT	PA Level Rent
1	[redacted]	FA	AC	2	AC	2	800	0		0
- Case Member Information:** A table with columns: Suff Ln, CIN, Name, Relation, DOB, SSN, Val, Sex, Ctnz/Nat, HB, CA, MA, SNAP, AFIS/S.

After the initial intake at the Express Center a pre determination will be assessed and the case will be sent to their responsible center.

- The worker will click on Suspend

The dialog box shows the following text and buttons:

- Close (X)
- Closing Window : Household Screen
- Current Activity : CA Recertification Interview
- Buttons: Complete Activity, Suspend Activity, Cancel

and a message will appear asking the worker if they are ready to send case to the responsible Job center.

The dialog box contains the following text and buttons:

- Suspending Center 050 Work (X)
- Is this case action ready for submission to the Responsible Job Center for completion?
- Buttons: Yes, No

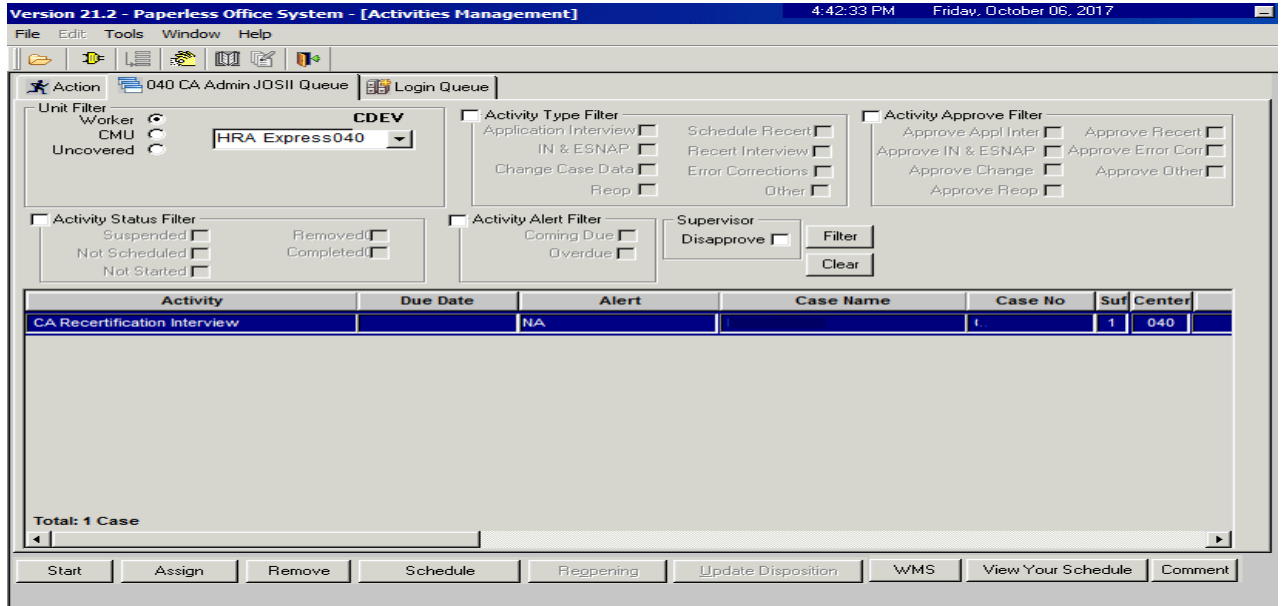
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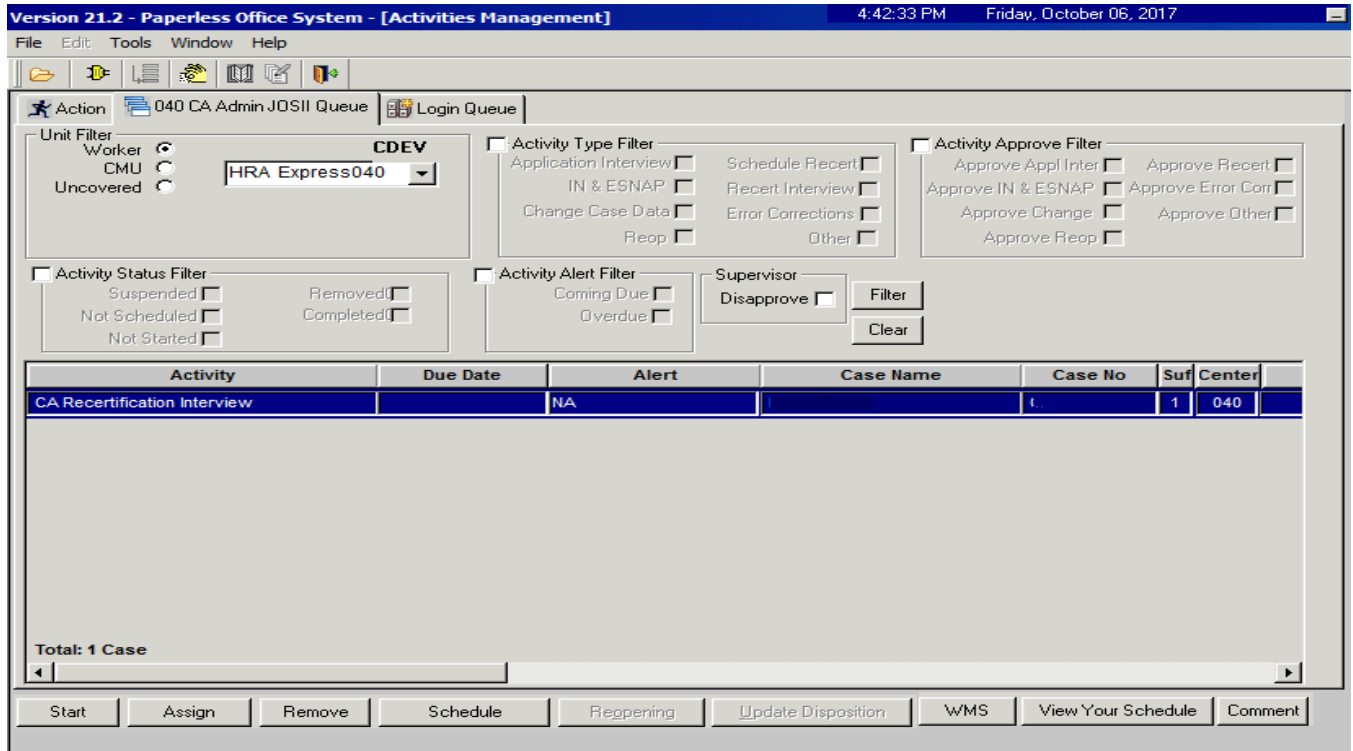
Is this case action ready for submission to the Responsible Job Center for completion?

The Worker will send the case to the responsible center queue. This Express # 50 queue must be monitored throughout the day to ensure expedient processing by a designated supervisor who will assign the cases to the worker.

Responsible Center Queue

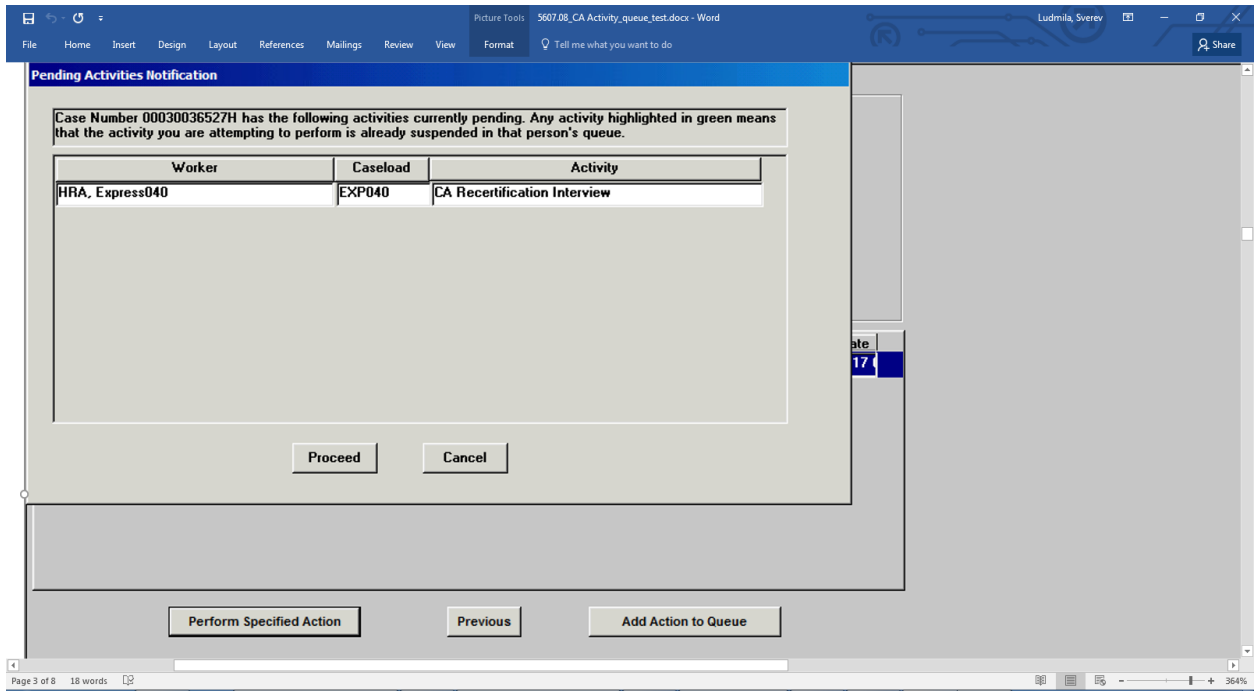


- The Worker will access their queue to start the activity.



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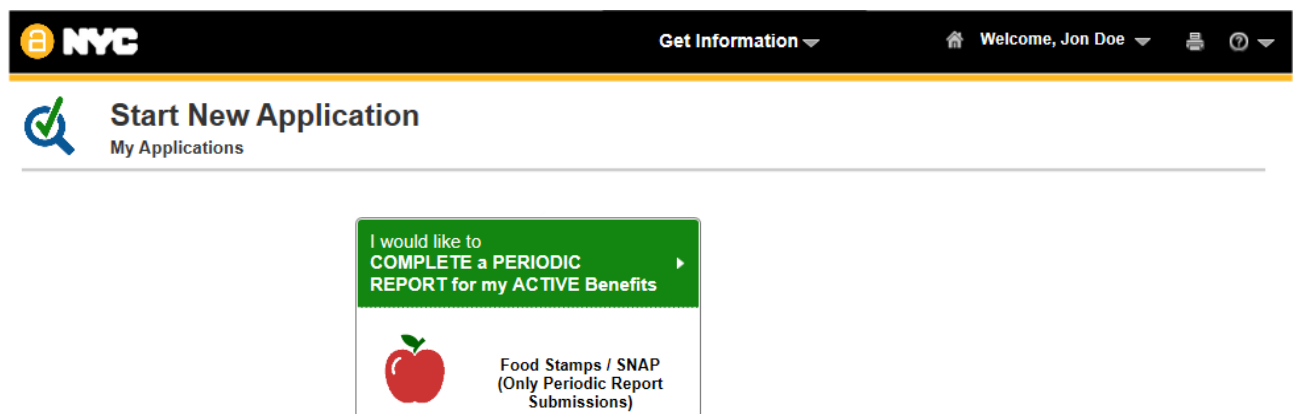
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- The Worker will proceed to process the **CA Recertification** activity.

2. ACCESS HRA Release 4

Release 4 of the Virtual Client Services Center (VCSC) will give SNAP (Supplemental Nutrition Assistance Program) participants the ability to complete their SNAP Periodic Report online through ACCESS HRA. This new flow will be available to ACCESS HRA participants that have linked their account by providing key identifying information and receiving confirmation of the successful link from POS (Paperless Office System). Those SNAP participants looking to complete an online Periodic Report with unlinked accounts will be prompted to “step up” their account as part of the Periodic Report screen flow.



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NYC Get Information Welcome, Jon Doe

Connect to My Case

SNAP Periodic Report

Keep track of your benefits and important case information online!

I am the Primary Contact (Head of Case) for my case

I am the Primary Contact (Head of Case) for my case, but do not have an SSN or CIN

Please enter your information below:

Date of Birth: * [dropdown] [dropdown] [dropdown]

Select **one**: * SSN (Social Security Number)
 CIN (Client Identification Number)

Social Security Number: [input] - [input] - [input]

Next

3. UIT Centralized Web Indexing Updates

A new **Universal Indexing tool (UIT)** has been added to enhance the current Centralized Web indexing process (tool) which was created to assist CA and SNAP applicant/participants in processing their program's requested returned documents expediently. FIA has created a Centralized Indexing Unit (CIU), Center **88** that has been responsible for indexing all images scanned at CA and SNAP locations throughout New York city.

The new Universal Indexing tool (UIT) has been updated to now accommodate all CA and Snap Centers starting November 1, 2017 with the exception of Center 88 who will be updated on the release date of October 23, 2017. Please refer to Attachment B, UIT Centralized Web Indexing Desk Guide for more in-depth details.

4. SNAP CBO Recertification Improvement Project (RIP)

The following message will be displayed for SNAP CBOs' who participate in RIP:

The client's authorization period is about to expire. This client must be interviewed by a SNAP worker at a SNAP site or via On Demand by Calling 718-SNAP-NOW. Before calling the On Demand line, please submit the recertification application via Access - HRA."

5. New ABAWD (Able Bodied Adults Without Dependents) Override Calendar

Currently the ABAWD compliance data is retrieved through a web service call to the ABAWD Calendar web service call. In the new change, the ABAWD compliance data must be retrieved through web service call to WRTS (Work Related Tracking System).

The Supervisor will send the Override transaction to WRTS system. This change is to enable the POS (Paperless Office System) users to override (or remove) a previous ABAWD strike for appropriate reason when needed. When POS workers find it necessary to remove one or more prior strikes, he/she must select the appropriate override reason code and justification for each override and send to the supervisor for approval.

The transaction to WRTS will be through a new Web service call.

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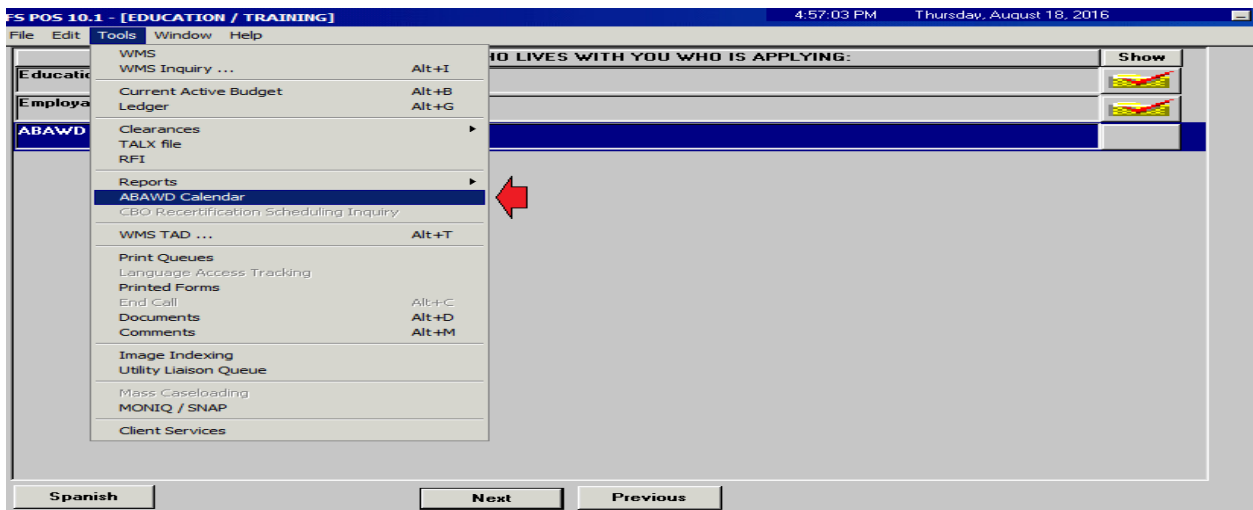
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Below are the only possible Override reason codes that are allowed by OTDA (Office of Temporary Disability Assistance) :

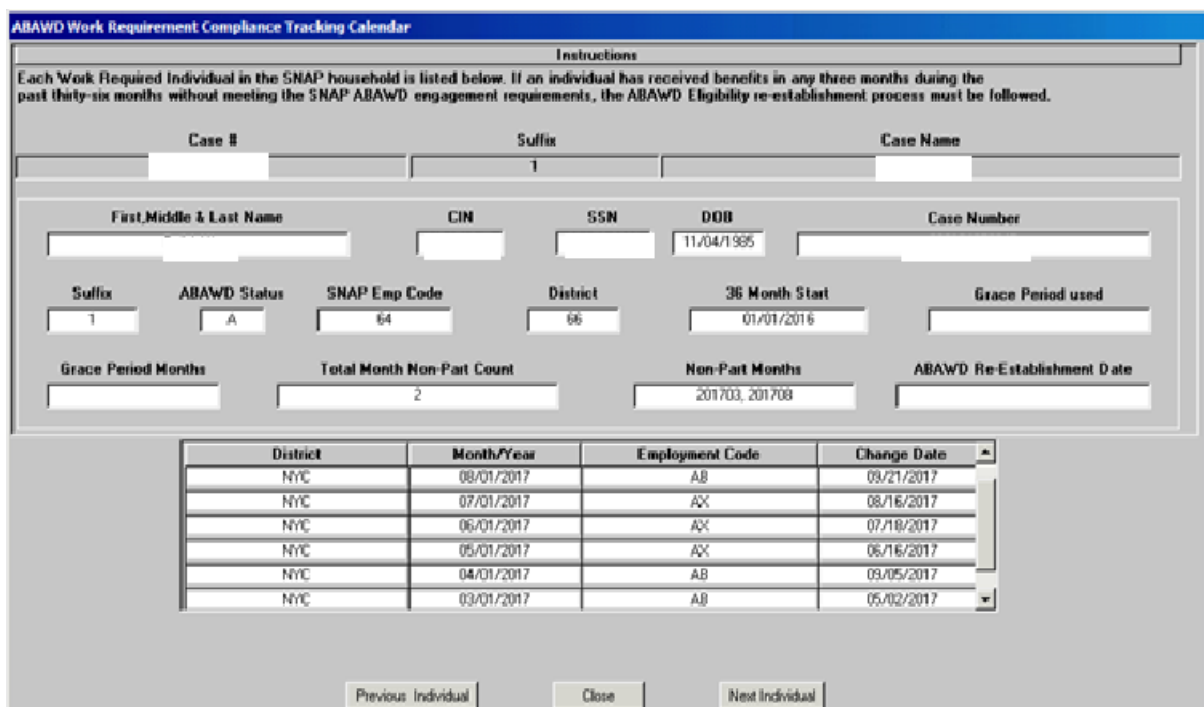
- **F – Fair Hearing Decision**
- **I - Incorrect Coding**
- **J - Client was living in waived area**
- **W - Wrong Individual**

The removal of strikes can be done only within 30 days after the end of the calendar quarter of the original strike month.

- To access the ABAWD calendar click on the **Tools** Menu.



New ABAWD Calendar window



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Supervisor Approval

When the supervisor attempts to transmit or complete the **Approval Activity** for the ABAWD calendar an edit will run to check if an Override Reason Code was selected by the Worker to delete the strike. If the override was not selected by the Worker thus the **ABAWD** window is not approved, and an error is displayed informing the Supervisor that the Worker must select the override reason and submit for supervisory approval.

6. Fair Hearing Compliance Update

Based on the Fair Hearing Administration request, POS has been assigned to update the SNAP FH (Fair Hearing) Compliance process to accommodate and track cases when retroactive benefits are issued under a different case number.

In instances when the Fair Hearing decision is to issue retroactive benefits and the applicant/participant has an active CA (Cash Assistance) or the SNAP case under a different case number than the case number under which the FH was requested, the FH Compliance Worker must issue retroactive benefits on that active case.

The HRA (Human Resources Administration) Fair Hearing Administration requested ITS (Information Technology Services) to save the Advocate name and the Information to a fair hearing table and send two copies of (**FHA-2** ([Fair Hearing Compliance Request – SNAP]/**FHA-2A** [Reminder Notice of Fair Hearing Compliance Request Supplemental Nutrition Assistance Program-SNAP])). One copy will be sent to the applicant/participant and the second copy to the advocate/legal representative, if available.

7. POS Implementation of the FHA-1 (Fair Hearing Resolution Notice)

The Fair Hearing Administration has requested to implement **FHA-1** in POS. The **FHA-1** will now be rolled into the PTM (Print to Mail) process. This new process will reduce the Worker's time and effort in completing, scanning/indexing, and mailing the form. It will also assist in Fair Hearing avoidance and the same day resolution conference initiative, and will ensure that translated versions of the form are provided to applicant/participants and a duplicate copy to advocates.

A new **Data-Entry** window has been added to the **Notice Data Entry Resource** window for CA and SNAP Fair Hearing Compliance. POS will prefill the notice giving the Worker/Supervisor the ability to make necessary changes and transmit to print locally or send to PTM.

The following activities will be affected:

- CA Change Case Data
- SNAP Change Case Data
- Re-open CA Case
- CA Recertification
- SNAP Recertification
- Approve CA Recertification
- Approve SNAP Recertification
- Approve Re-open CA Case
- Approve CA Case Action
- Approve SNAP Change
- Review Activity

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FHA-1 Data Entry Window

Response to Question

FHA-1 FAIR HEARING RESOLUTION NOTICE

SECTION I: FAIR HEARING ISSUE

Your Fair Hearing Number 1234567A

You requested a Fair Hearing because we sent you a notice: Notice Number Date of Notice MM/DD/YYYY

Telling you: Because:

Your Fair Hearing request was not related to a notice.

The actions explained in this resolution notice are not related to a Fair Hearing. Advocate Information

SECTION II: ACTION(S) TAKEN

Deleted/Removed

We withdrew the notice CNS or RTI #: dated MM/DD/YYYY

Benefits taken to recover RTI #: were credited to RTI #: or another active recoupment.

We deleted from your case record the:

Employment sanction for: Joan Doe dated MM/DD/YYYY

Overpayment/recoupment RTI # in the amount of: \$ 0.00

Child Support (OCSE) sanction

We removed John Doe, Fred Doe, Joan Doe from your Cash Assistance household budget. Supplemental Nutrition Assistance Program household budget.

Re-instated/Added

We reopened your case.

We have recertified your: Cash Assistance case SNAP case Your new CED date is: MM/DD/YYYY

We reinstated your: Medicaid eligibility retroactively to: MM/DD/YYYY Child Care for the period of MM/DD/YYYY to MM/DD/YYYY

We added John Doe, Fred Doe, Joan Doe from your Cash Assistance household budget. Supplemental Nutrition Assistance Program household budget.

Issued

the cash benefits you lost because of our case action. Specifically we issued cash benefits on your EBT card in the amount(s) of:

rent directly to your landlord in the amount(s) of:

We issued: a shelter supplement (e.g. FEPS) directly to your landlord in the amount(s) of:

the SNAP benefits you lost because of our case action. Specifically we issued SNAP benefits on your EBT card in the amount(s) of:

carfare to you in the amount(s) of:

Budget

Since you were granted "aid to continue," you did not lose any benefits as a result of the notice we sent you. However:

Your case/line is now active for recurring benefits. Your case/line remains closed or sanctioned because of an unrelated closing or sanction.

We are not issuing any Cash Assistance benefits at this time because your case/line is closed due to an unrelated issue.

We are not issuing any SNAP benefits at this time because your certification period has expired.

Your budget change will NOT go into effect and your benefits remain unchanged.

Your budget is being changed. Effective MM/DD/YYYY, your new grant will be \$ 0.00 semi-monthly.

Miscellaneous

We will review/re-evaluate your medical claim. You will receive a new appointment to review this claim.

Other

OK Cancel

8. CBO (Community Based Organization) Submission Report

CBOs are now submitting CA E Recertifications and CA EAPPs. A report has been created to track these submissions which will be located on the POS Management Console.

9. POS Business Rule Update

POS calculation of the applicant/participant's Age is different than WMS (Welfare Management System). When POS determines the age for the ABAWD indicator and SNAP Employment code this causes a discrepancy. Consequently, POS has updated the AGE business rule to give the correct calculation for ABAWD determination.

10. POS TAD Business Rule Update

An update has been added to the POS TAD for Code V21 (Failure to Provide Verification). When the Worker answers **Yes** for "Is employed?" question, but leaves the document box blank without selecting any document.

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11. WMS Release 2017.3

October 2017 SNAP Table Changes and THRIFTY Food Plan MRB

Effective October 1, 2017, Supplemental Nutrition Assistance Program (SNAP) Standard Deductions, Excess Shelter Maximum, 130%, 150% and 200% Poverty Level, Standard Utility Allowance (SUA), NYSNIP (New York State Nutritional Incentive Program), and Net Income Level will change. The changed amounts will be used for budgets with Effective Dates of 10/A/2017 or later. Budgets with Effective Dates prior to 10/A/2017 will continue to use current amounts.

Monthly amounts for budgets with Effective Dates of 10/A/2017:

Standard Deduction –

- Households of 1 through 3 – \$160 (new)
- Households of 4 – \$170 (new)
- Households of 5 – \$199 (new)
- Households of 6 or greater – \$228 (new)

Excess Shelter Maximum – \$535 (new)

Minimum SNAP allotment amounts for household size 1-2 – \$15 (new)

130%, 150% 200% Gross Levels, Net Income Levels, Zero Benefit Levels, TFP Levels (new)

HH Size	Gross 130% Income Level	Gross 150% Income Level	Gross 200% Income Level	SNAP Net Income Level	SNAP Excess Income Level	SNAP Max. Allotment
01	\$1,307	\$1,508	\$2,010	\$1,005	NA	\$192
02	1,760	2,031	2,708	1,354	NA	352
03	2,213	2,553	3,404	1,702	1,676.70	504
04	2,665	3,075	4,100	2,050	2,130.04	640
05	3,118	3,599	4,798	2,399	2,530.04	760
06	3,571	3,971	5,294	2,747	3,040.04	913
07	4,024	4,643	6,190	3,095	3,360.04	1,009
08	4,477	5,166	6,888	3,444	3,840.04	1,153
09	4,930	5,690	7,586	3,793	4,320.04	1,297
10	5,383	6,214	8,284	4,142	4,800.04	1,441
11	5,836	6,738	8,982	4,491	5,280.04	1,585
12	6,289	7,262	9,680	4,840	5,760.04	1,729
13	6,742	7,786	10,378	5,189	6,240.04	1,873
14	7,195	8,310	11,076	5,538	6,720.04	2,017
15	7,648	8,834	11,774	5,887	7,200.04	2,161
16	8,101	9,358	12,472	6,236	7,680.04	2,305
17	8,554	9,882	13,170	6,585	8,160.04	2,449
18	9,007	10,406	13,868	6,934	8,640.04	2,593
19	9,460	10,930	14,566	7,283	9,120.04	2,737
20	9,913	11,454	15,264	7,632	9,600.04	2,881

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Standard Utility Allowance (SUA)

The SNAP SUA amounts for New York City will change effective 10/A/2017:

- Combined Heat/Utility/Phone SUA (Level 1) \$791 (new)
- Combined Utility/Phone SUA (Level 2) \$313 (new)
- Telephone SUA (Level 3) \$30 (new)

NYSNIP

NYSNIP benefit levels will be provided later – TBD.

CNS (Client Notices System)

CNS paragraphs will be updated separately.

Medicaid

There are no MA implications with this mass update.

Turning 65 Medicare Requirement

All applicants/participants should apply for Medicare at age 65. POS will transmit the Medicaid Indicator to WMS to identify those 65 year old's that must apply for Medicare benefits.

12. POS E-Forms

The following forms have been revised and updated accordingly:

- FIA 1138** Do you have documents to submit to the Human Resources Administration (HRA)?
- M3mm**, Notification of Application Withdrawal Cash Assistance, Food Stamps and Medical Assistance
- FIA 1125A**, Outcome of Review of Undue Hardship Claim
- FIA 1125AC**, Notice of Need to Reestablish ABAWD Eligibility
- FIA-1021b**, Declaration of Job search activities
- FIA-1179** Acknowledgment of Agreement to receive Paperless Notice
- FIA-1179a** Notice of Stopped Paperless Notifications
- FHA-1** Fair Hearing Resolution Notice
- BEV-100**, Notice of Real Property Ownership Appointment
- BEV-201** Generic BEV Referral
- BEV-251** Notice to Applicant Referral to BEV
- W-523-R** Notice to Applicant Referral to BEV

UIT Centralized Web Indexing Desk Guide

Introduction

A new **Universal Indexing tool** (UIT) has been added to enhance the current Centralized Web indexing process (tool) which was created to assist CA and SNAP (Supplemental Nutrition Assistance Program) applicant/participants in processing their program's requested returned documents expediently. FIA (Family Independence Administration) has created a Centralized Indexing Unit (CIU), Center **88** that has been responsible for indexing all images scanned at CA and SNAP locations throughout New York city.

The new Universal Indexing tool (UIT) has been updated to now accommodate all CA and Snap Centers starting November 1, 2017 with the exception of Center 88 who will be updated on the release date of October 23, 2017.

This guide includes the new universal indexing tool updates.

This new UIT will replace the current indexing and Web indexing tools utilized by POS (Paperless Office System). The new tool will support the work allocation and management of staff to prevent multiple workers from working on the same scanned image. In addition new Icons will be introduced to workers to identify unrelated documents and remove documents when deemed necessary.

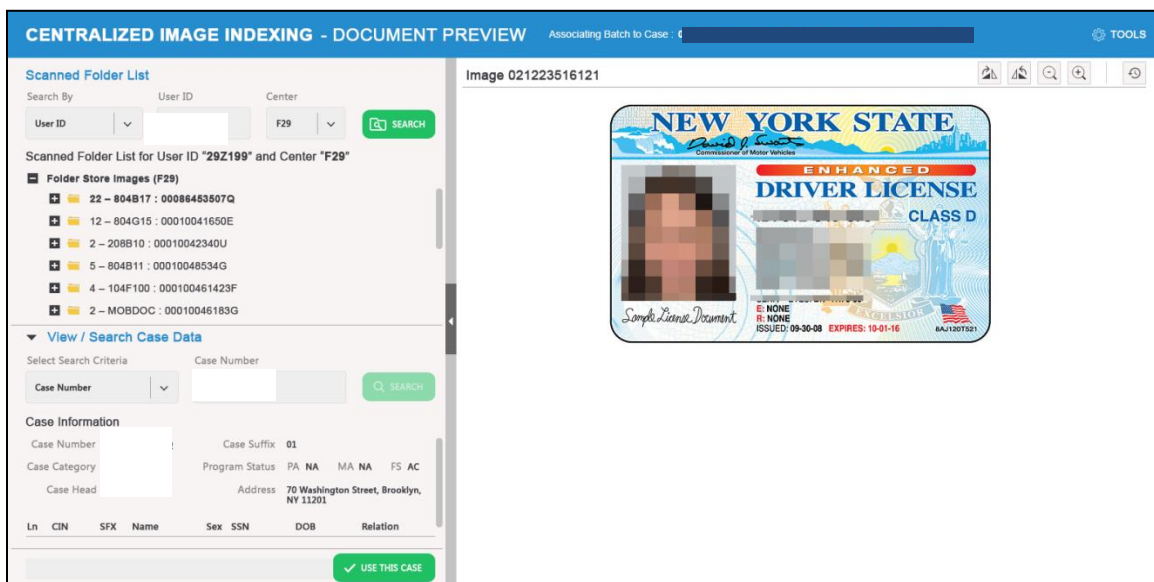
The Web Indexing process will not require printing and will follow the document intake activity within the POS system. The Documentation receipt (**EXP 76R**) will be sent directly from MIS (Management Information Systems) to the applicant/participant by their Print to Mail process. This desk guide provides an overview of retrieving, indexing and committing requested/mandated documentation for eligibility determinations and/or for on-going assistance.

Accessing Centralized Web Indexing

Center **88** designated CIU staff and CA/SNAP sites will access the Universal Web Indexing tool thru the POS portal. Centralized Image indexing link will be available based on the Worker's role and authentication within POS system.



When the Worker clicks on the Web Image Indexing located on the POS portal, the **Document Preview** window will open. The main function of this window is to give the Worker the ability to determine and associate the correct case number prior to indexing the document.



The **Document Preview** window will display the following items to assist the worker in identifying and associating the scanned image to the correct case and individual line thru a number of search criteria.

Update to Document Preview

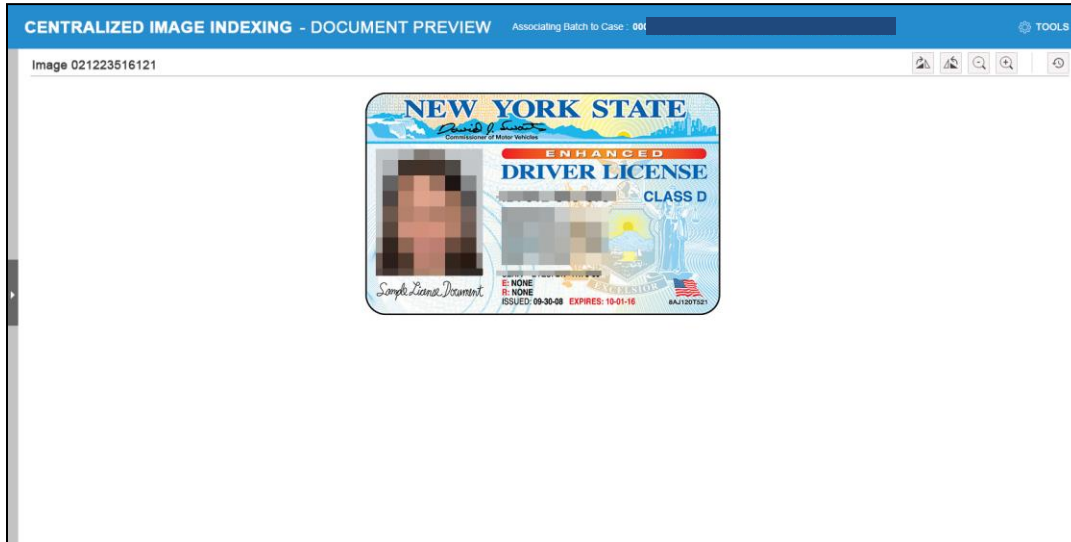
Header

- Application logo/heading text with page title.
- Details of Case number.
- Name of the selected Case Folder.

The “**TOOLS**” menu is consistent throughout the application. The menu has quick links to About application, HRA One Viewer and Logout.

Left Collapsible Panel (Splitter line)

- The Document Preview Panel has the ability to collapse and expand to display the maximum screen for identifying and previewing an image. The Worker will click on the Splitter line (line in middle of the document preview screen) to display the full preview of the imaged document.

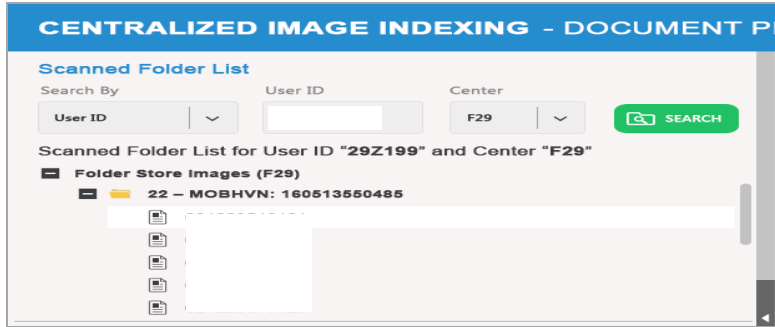


Main Content Area

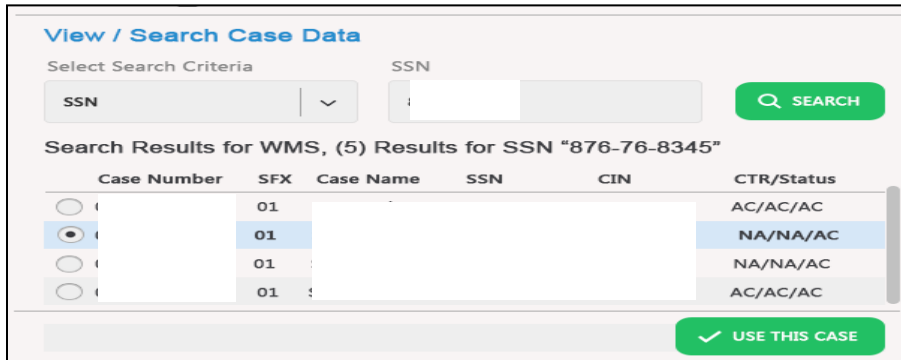
- It contains full size image and high resolution preview of image with image preview and manipulation controls.

The Worker will be able to manipulate the image by using the Image manipulation toolbar located in the upper right corner of the document preview. The image manipulation toolbar contains the options of “Rotate Right”, “Rotate Left”, “Crop”, “Increase Magnification”, “Decrease Magnification”.

The Crop feature will be added once the Worker associates the images and clicks next to arrive at the document indexing window. The Worker is able to go back to the **Document Preview** window to search and complete the associated case by clicking on the splitter cursor located on the far left



The section contains documents/images associated with case for review. It displays the list of case folder(s) scanned under the CIU logged-in User ID. The Worker can search/retrieve scanned case folder(s) for a particular Center either by specific User ID or a specific Case Number or All Folders. They are able to change the center by using the drop-down arrow to display all centers for selection.



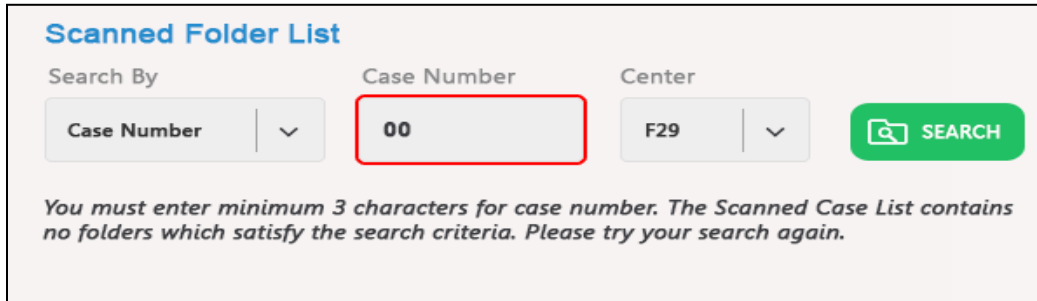
Dropdown of WMS (Welfare Management System) search options under the **View/Search Case Data** helps Workers to search and find appropriate case data. The dropdown arrow includes search criteria options of **Case Number**, **SSN**, **CIN (Client Identification Number)** and **ANYC Confirmation Number**.

The Worker will select their search criteria first (Case number, SSN, CIN and ANYC) for searching WMS. Then enter the complete characters and or numbers associated with the case or at least three characters to start the search process. The system will retrieve the scanned folder list or display the following message:

“The scanned folder list contains no folders which satisfy the search criteria. Please try your search again.”

If the Worker does not enter the required minimum of three characters for the number he/she will receive the following message:

“To perform search user must enter minimum 3 characters for case number. The scanned folder list contains no folders which satisfy the search criteria. Please try your search again.”



Scanned Folder List

Search By Case Number Center

Case Number 00 F29 SEARCH

You must enter minimum 3 characters for case number. The Scanned Case List contains no folders which satisfy the search criteria. Please try your search again.

When the Worker enters the required amount of digits/characters for the Case number, SSN, CIN or ANYC Confirmation number. If search validation fails based on the worker's entered information an error message will display informing worker of error:



CIN

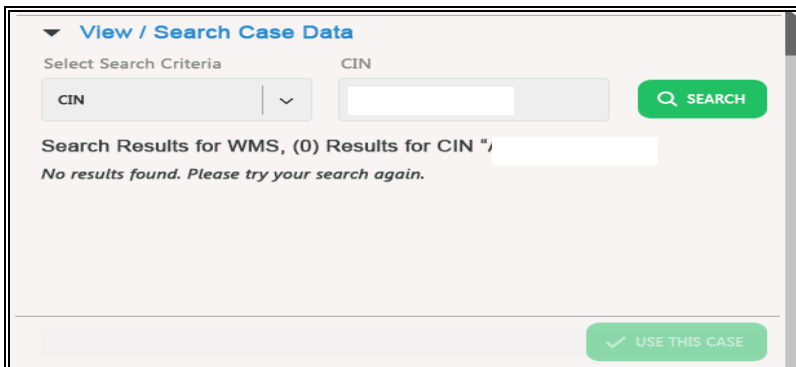
ABXT7

Entered CIN is invalid

- Case number is invalid
- SSN is invalid
- CIN is invalid
- Conf No is invalid

WMS Case search with Blank results

If the Worker entered in search information but WMS found no results, the worker will see the following displayed:



View / Search Case Data

Select Search Criteria CIN

CIN SEARCH

Search Results for WMS, (0) Results for CIN *

No results found. Please try your search again.

USE THIS CASE

When no results are found, this case button at the bottom of the window is disabled.

WMS Case search with Selected Case results

The screenshot shows the 'View / Search Case Data' interface. At the top, there is a search criteria dropdown set to 'SSN' and an input field for the SSN value. A green 'SEARCH' button is to the right. Below this, the search results are displayed as 'Search Results for WMS, (5) Results for SSN'. A table lists five results with columns for Case Number, SFX, Case Name, SSN, CIN, and CTR/Status. The second row is selected, and a green 'USE THIS CASE' button is visible at the bottom right.

Case Number	SFX	Case Name	SSN	CIN	CTR/Status
0	01				AC/AC/AC
0	01				NA/NA/AC
0	01				NA/NA/AC
0	01				AC/AC/AC

- When results are found the Worker must select the case first which will enable the **Use This Case** button is enabled for the Worker to select the case to display the case information.

Case Information window:

The screenshot shows the 'View / Search Case Data' interface with the 'Case Information' section expanded. It displays various case attributes including Case Number, Case Suffix, Case Category, Program Status, Case Head, and Address. Below this, a table lists case members with columns for Ln, CIN, Name, Sex, SSN, DOB, and Relation. A green 'USE THIS CASE' button is visible at the bottom right.

Case Information

Case Number: [Redacted] Case Suffix: 01
 Case Category: FS Program Status: PA NA MA NA FS AC
 Case Head: Steve Johnson Address: 70 Washington Street, Brooklyn, NY 11201

Ln	CIN	Name	Sex	SSN	DOB	Relation
1						Case Head
2						Wife
3						Father

Case Information Section

The detailed section of case information aids the Worker in matching and validating case data for the requested case documents. The use of the case decision on use of that case number for document indexing.

- Case member information displays read only case attribute details such as Case Number, Case Suffix, Case Category, Program Status, Case Head and Address.

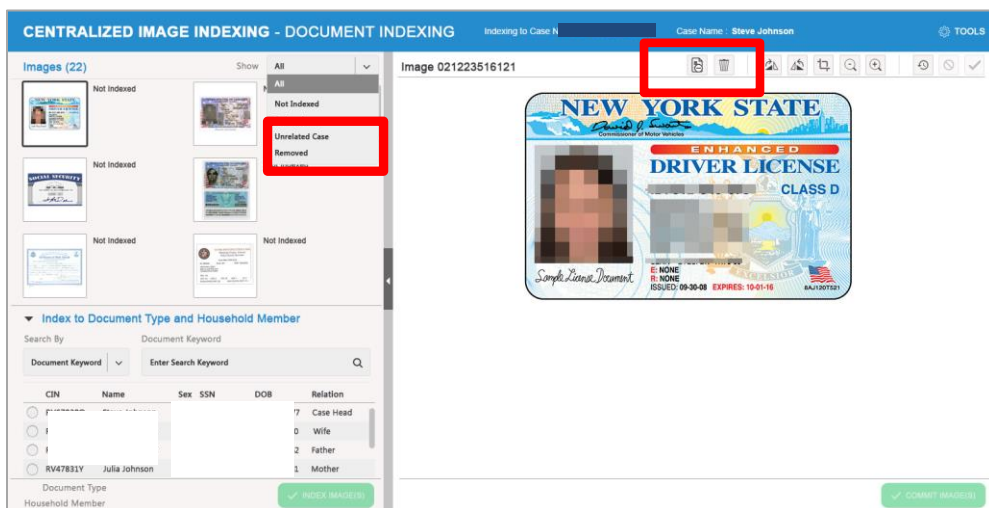
- The section also shows the data displaying read only information of household member. The household member(s) data grid has column headers of Line Number, CIN, Name, Sex, SSN, DOB (Date of Birth) and Relation.

The “**USE THIS CASE**” button is enabled only when the Worker selects one of the case records from the search results list. When the Worker clicks the **Use this case button**, he/she will be navigated directly to the Document Indexing page where the selected case and their associated documents must be indexed to the appropriate document type and household member CIN to complete the indexing process..

Document Indexing

The document indexing page is the main page where the Worker performs image manipulation in preparing the image for indexing. Indexing requires the Worker to map the case, index the scanned image to the appropriate document type and the associated household member.

This page is divided into three sections (Header, left panel and main content area) similar to the previous document page.



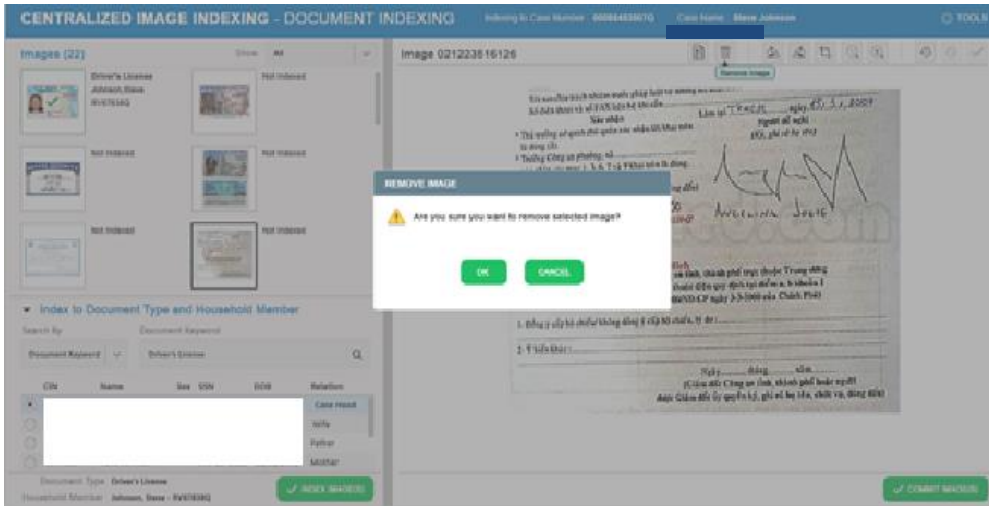
New “Unrelated” and “Remove” Icons

The UTI filtering option now includes the new addition of the Unrelated case and Removed filter icons which are located at the top of the main content and the drop down menu.

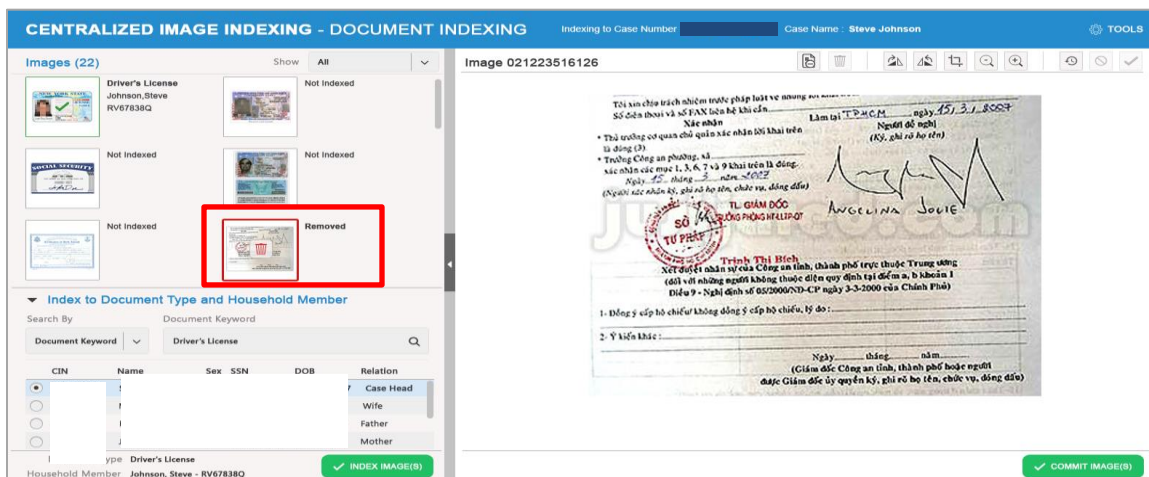
Workers can use the **unrelated** case option to index any unrelated documents to a new dummy folder and will disappear from the image thumbnail list. The images identified as a unrelated case must be processed after the current case is committed.

All unwanted and duplicate images can be marked and tagged as removed from the case folder document imaging page. When the worker identifies an image and clicks on the Remove Image icon, the system will display the following message:

- Are you sure you want to remove the selected images from the case?



- Once the Worker confirms and clicks **OK** button then it will mark the selected image as removed.



Images will not be removed until the Worker commits the images. The Worker is only allowed to remove one image at a time. Before submitting the image as removed the worker can change the image to index or unrelated case.

- Application logo/heading text with page title.
- Details of Associating case number.
- Details of Associating case head.

- Back link to Document Review page.
- The “**TOOLS**” menu which is consistent throughout the application will display the new **unrelated** case and the new **remove** icon.



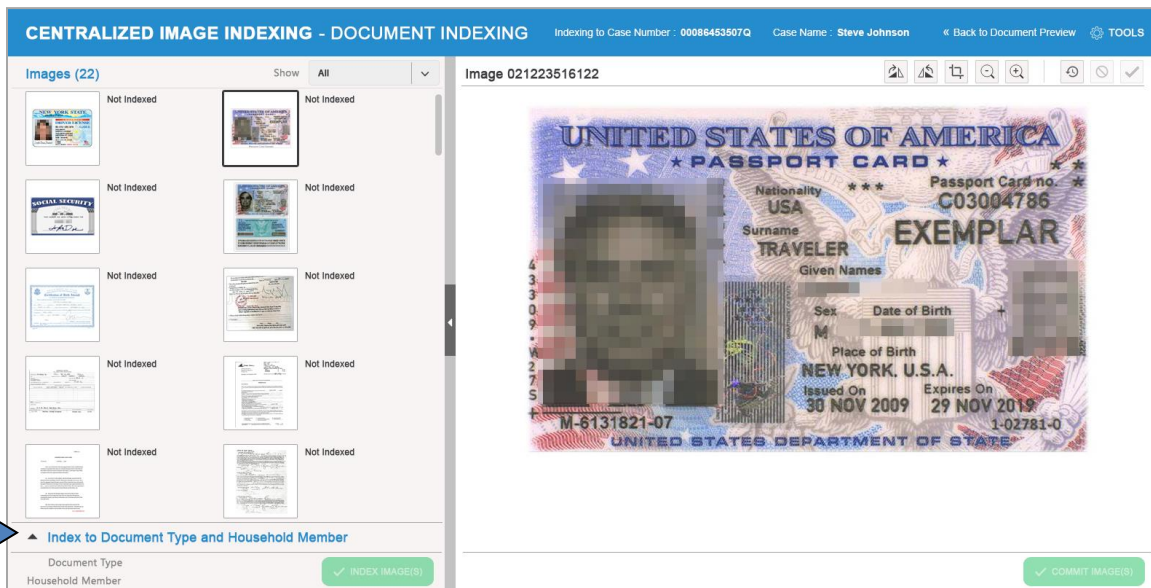
Left Collapsible Panel

- The Vertical splitter allows user to collapse the left panel. This gives an ability to preview image in full pane.
- Left panel consist the scanned image thumb list and Document type selectors with the list of Household members.
- The section of document type selector with list of Household members is a collapsible/expandable section. It gives the worker the ability to view thumbnails on bigger view panel.

Main Content Area

- Contains full size image with image preview and manipulation controls.

Centralized Image Indexing Window in Collapsed State



- The Worker can open the collapsed indexing window to display the list of household members by **selecting the Index to Document Type and Household member** to select the corresponding individual and choose the document type.

CIN	Name	Sex	SSN	DOB	Relation
<input type="radio"/>					Case Head
<input type="radio"/>					Wife
<input type="radio"/>					Father
<input type="radio"/>					Mother

Search By Document Keywords

(Search by Dropdown List) The **Document Keyword** will open and enable the textbox for keyword search with an auto-complete capability.

Document Keyword

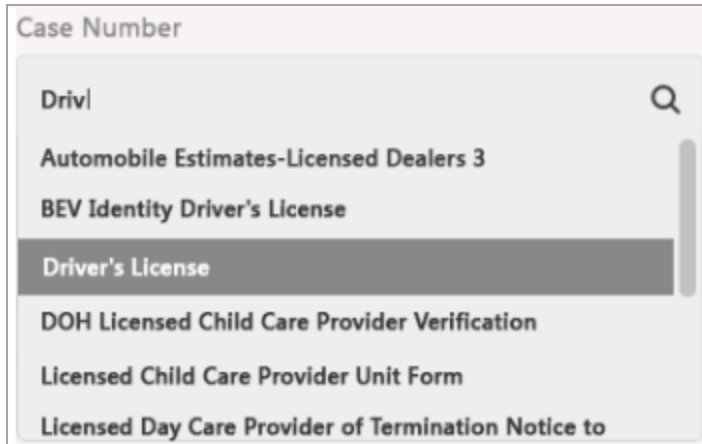
Enter Search Keyword

- The Worker starts entering search criteria and the CIU system starts displaying suggested document types.

Case Number

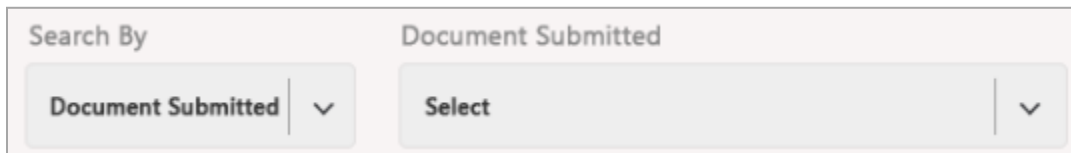
- Drivl
- Automobile Estimates-Licensed Dealers 3
- BEV Identity Driver's License
- Driver's License
- DOH Licensed Child Care Provider Verification
- Licensed Child Care Provider Unit Form
- Licensed Day Care Provider of Termination Notice to

- The Worker scrolls through the search results and then selects the appropriate document type (worker's selection gets highlighted).



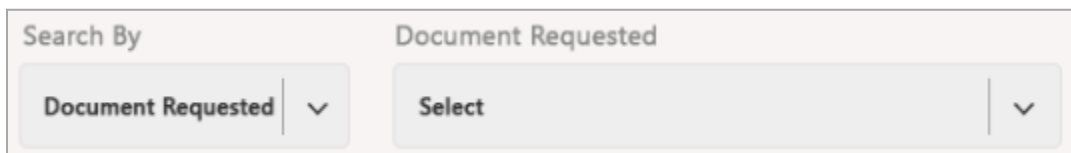
The Worker can always enter and search for a new document type or keyword to override the previously selected item.

The Worker is also able to search by **document submitted**:



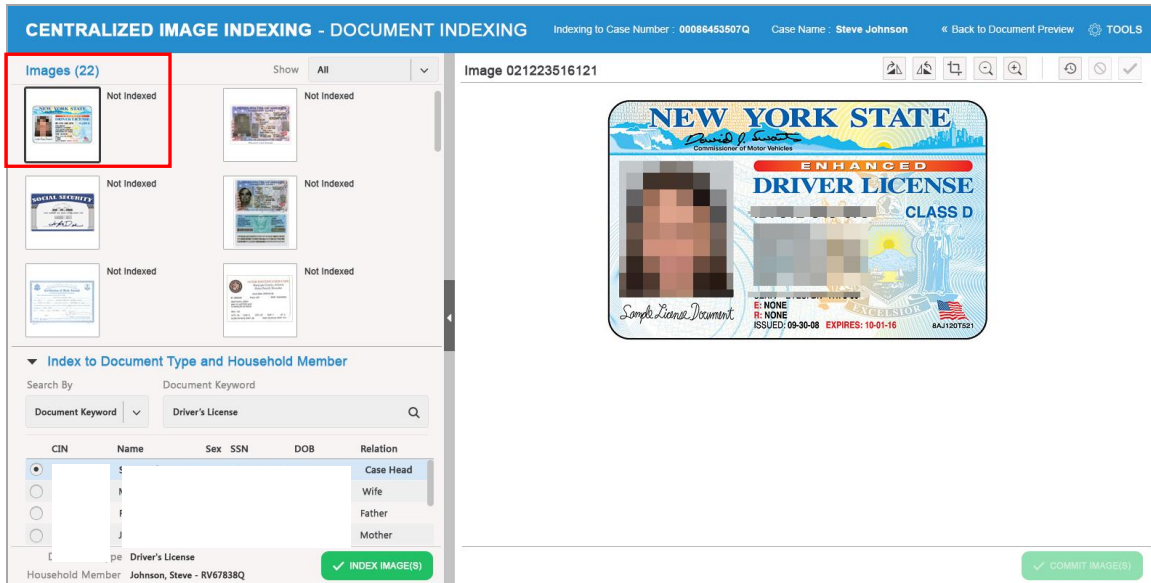
This will open the list of documents submitted by the applicant/participant.

Search by document requested:

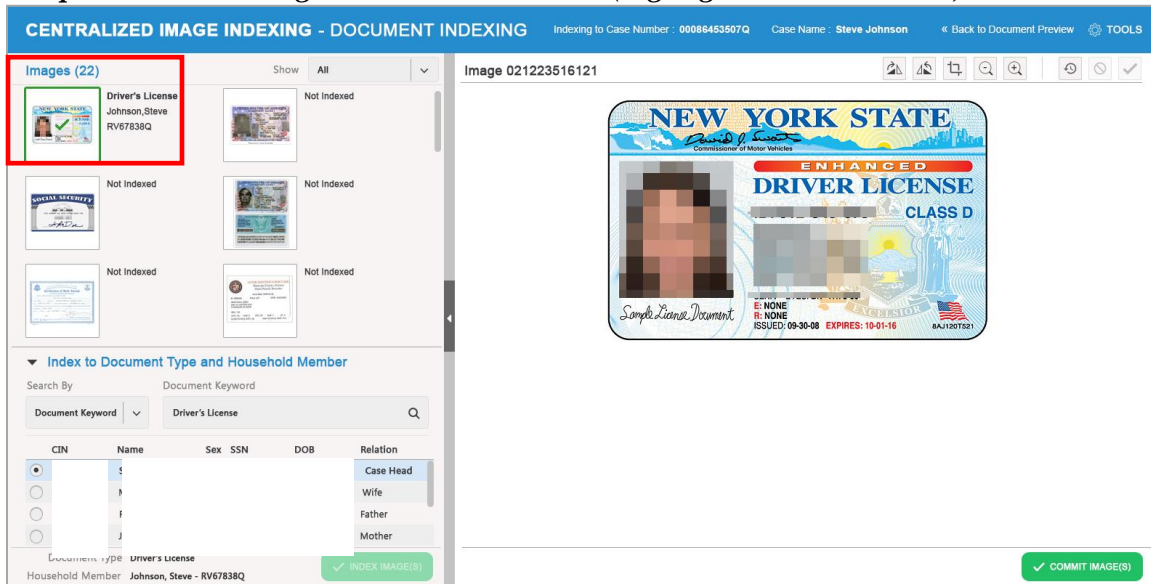


The Worker is able to enter the requested document to help find the scanned document.

See the sample screen on the next page showing document(s) Not Indexed (highlighted in red border).



Sample screen showing an indexed document (highlighted in red border)



Indexing Images

To complete the indexing process, all scanned images must be associated to the case and mapped to the document type and household member (CIN).

- The title text of Scanned Image List. The section contains the thumbnail list of documents associated with a case for indexing.
- The filtering option to narrow down the image display in thumbnail list. The filtering options available for the workers are All, Not Indexed and Indexed. Thumbnail image list should display the images based on the selected filtering criteria.



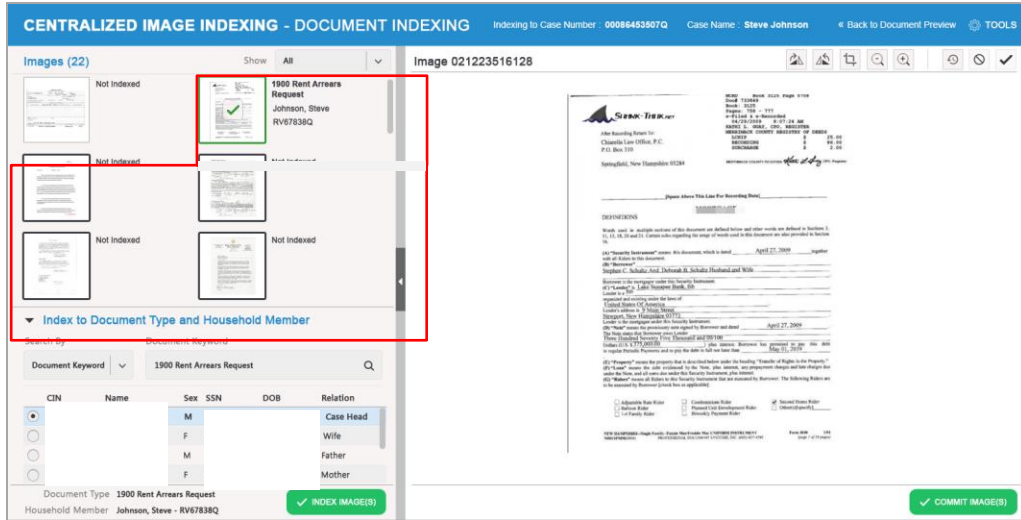
- The images in the case folder appear as a thumbnail on the left panel. When the user clicks on a thumbnail, the full image appears in the viewing pane on the right panel of the page. The image thumbnail must be viewed individually to determine what document type the image is. See [Index Image\(s\)](#) section.
- If there are multiple images for a single document, the images must be indexed and committed at the same time so that they appear as a single document in the HRA One Viewer. See [Index Multiple Image\(s\)](#) section.
- By selecting an image thumbnail in left panel displays the full image preview in viewing pane on the right panel of the page. The image is not yet indexed and so the text label shows the label as “**Not Indexed**”.
- Click on “**INDEX IMAGE(S)**” button to map the selected image(s) from thumbnail list to the selected document type and household member (CIN).
- Once the image(s) have been indexed, the thumbnail image(s) will be marked with green checkmark icon and green image border. The thumbnail image label displays the updated indexed image metadata information of Document Type, Name (Last Name, First Name) and the household member ‘s CIN.
- Click on “**COMMIT IMAGE(S)**” button will commit/submit the images to the HRA One Viewer.

Indexing Multiple Images

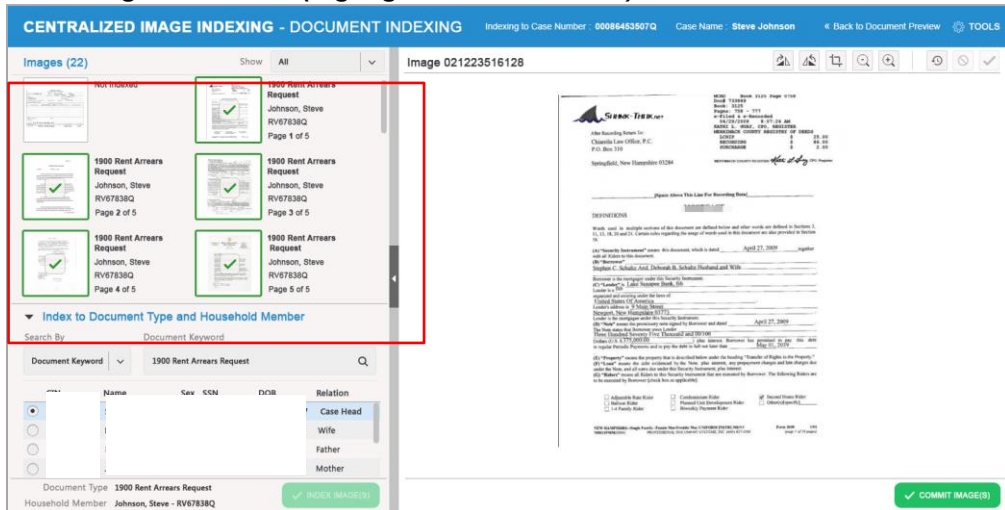
If there are multiple images for a single document, the images must be indexed and committed at the same time so they appear as a single document in the HRA One Viewer.

See the sample screen on the next page showing multiple images selected (highlighted in red border) for combining multiple scanned images into a single document.

Attachment B Desk Guide: UIT Centralized Web Indexing
Date: October 23, 2017



Sample screen showing images can be selected at the same time and indexed together into a single document (highlighted in red border).



- The Worker can select multiple thumbnail images from thumbnail image list. To do this, user should follow below steps in sequence.
 - Hold down the Ctrl-Shift key.
 - Clicks on an already indexed thumbnail image.
 - Clicks other associated thumbnail images that are part of the same document type.
 - Worker releases the Ctrl-Shift buttons.
 - Click on “INDEX IMAGE(S)” button.
- Once the images are indexed, the information of the images gets updated with the latest indexing information of Document Type, Name (Last Name, First Name), household member CIN and number of images (pages) in the document.

- Click of “**COMMIT IMAGE(S)**” button will submit the images to the HRA One Viewer.

Image preview and Image Manipulation Toolbar

If there are multiple images submitted for a document type, all images must be adjusted and selected before proceeding to the next step. Image manipulation tools allow user to better handle and view the image content. The image manipulation toolbar contains the options of “Rotate Right”, “Rotate Left”, “Crop”, “Increase Magnification”, “Decrease Magnification”. These image controls are required to adjust the image for readability and size before the final image commit.

Sample image is showing image preview and image manipulation controls.





- Clicking on “**Rotate Right**” icon rotates the selected image clockwise.
- Clicking on “**Rotate Left**” icon rotates the selected image anticlockwise.

Crop Instructions

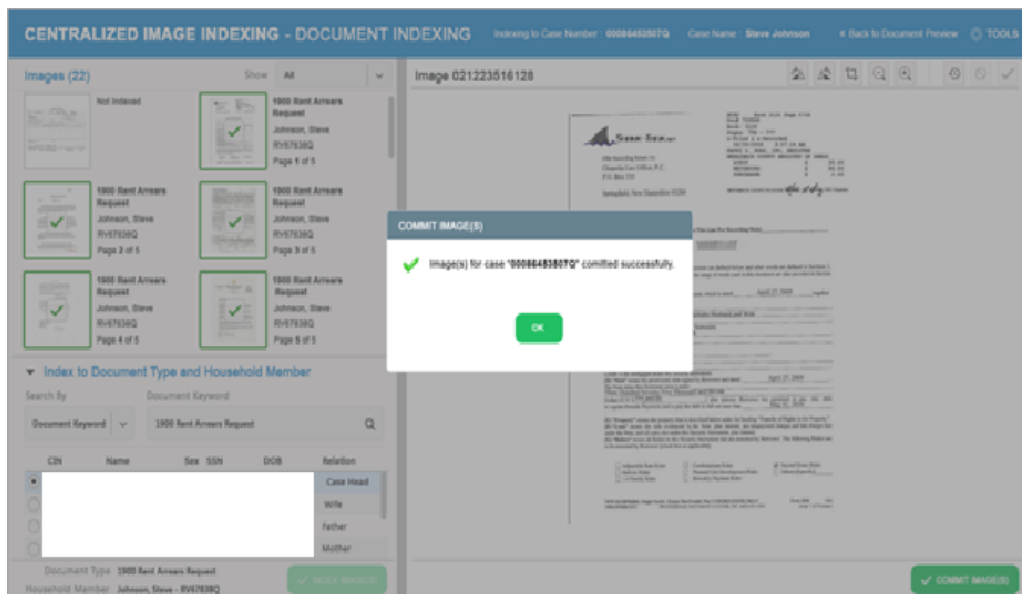
- Clicking on “**Crop**” icon automatically selects the entire image. Cropping an image consists of several steps:
 - The Worker first needs to select the cropping area by clicking and dragging on the image to select the desired area, or user can drag the corners and edge handles to the desired size.

Note: The area inside the crop box is the part of the image that will be kept. Everything outside the box will be cropped away.

- When the image looks fine within the cropped area, the Worker will apply the crop by clicking the checkmark (Save) tool button.
 - Clicking on checkmark (Save)  button will save the cropped image as a separate copy in image list. The original image remains in image list without any edits.
 - Clicking on Cancel  tool button will cancel the crop operation.
- Clicking on “**Increase Magnification**” increases the selected image magnification.
 - Clicking on “**Decrease Magnification**” decreases the selected image magnification.
 - Clicking on “**Restore Original**” icon revert all previous image manipulation changes on selected image to its original state.

- Clicking on “**Cancel**” icon cancels the current crop operation.
- Clicking on “**Save**” icon save/commits the current image manipulation changes such as “**Rotate Right**”, “**Rotate Left**”, “**Crop**”.

Commit Images



- The System displays the message box titled committed image(s) on successful save of the images to the HRA One Viewer.
- The message text is “**Image(s) for case <WMS Case Number> committed successfully.**”
- The click of the “**OK**” button on the **Committed Images** dialog box will return the Worker back to the **Document Indexing** page. Once the images have been successfully committed to the HRA One Viewer, the images will disappear from the **Document Indexing** page and by default the system will pick and highlight the next image in the image thumbnail list.
- If all the images in the case folder from the current case are processed and committed successfully the system will automatically navigate the Worker to the **Document Preview** page and display other scanned image folder(s) for processing if necessary.