OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #18-17-SYS

SETTLE IN CONFERENCE (SIC) FOR CASH ASSISTANCE (CA) PARTICIPANTS WHO COMPLY WITH THEIR FACE TO FACE RECERTIFICATION (FFR) INTERVIEW AFTER THE CLOSING IS INITIATED

Date: March 28, 2018	**Subtopic(s):** Recertification
Center 90 Staff only	The purpose of this policy bulletin is to remind all Job Center staff about processing a Settle in Conference (SIC) action when a participant with a pending **G10** (Failure to Recertify) or **G20** (Failure to Recertify – Home Visit) reports to the center for an interview or complies with a homebound interview. When an individual reports to the Job Center and has a pending **G10** or **G20** clocking down in the Welfare Management System (WMS), staff must start the **Settle in Conference** activity from the Action Menu in the Paperless Office System (POS). **Note**: For cases with a pending **G20** where the participant requests a rescheduled home visit, after missing the initial appointment and failing to respond to multiple outreach attempts, the SIC activity must be completed <u>after</u> the home visit is conducted. After initiating the activity, and navigating through the **Communication Preferences** screen, the **Client Services Screen**, and the **Household** screen, the **Transaction Selection** screen will open. **Note**: Staff must ensure that if there are any Reasonable Accommodations (RAs) that need to be honored during the interview, such as help with reading forms, that they provide the necessary assistance.

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

Transaction Selection screen	On the **Transaction Selection** screen, staff must select the appropriate pending WMS transaction that is associated with the **G10** or **G20** closing. If there is more than one **WMS** transaction pending, staff must go into WMS to verify which transaction is the **G10** or **G20**. Once this is done, staff must go back to POS, select the correct pending transaction and then click "Next" to open the **Details** screen.
Transaction Selection screen	
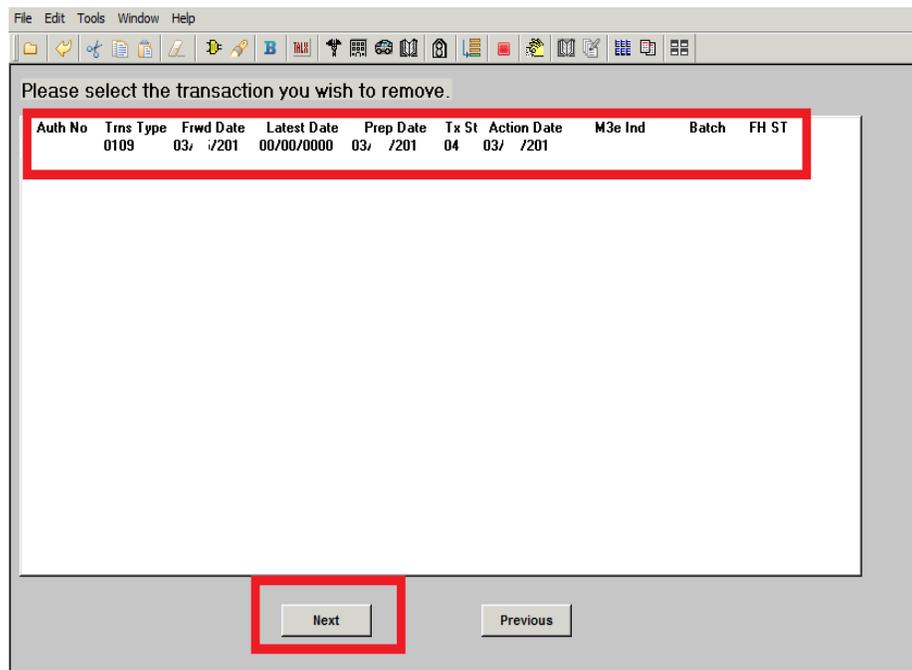
On the **Details** screen, staff must select either "Client Kept Appointment – Recertification" or "Client Complied – Recertification" from the Reason for SIC drop down menu. Staff must then enter additional comments or information in the "Other Valid SIC Details" text box. The "Do you have all required information/documentation to proceed with this action?" question must then be answered "Yes" as the individual's appearance for the face-to-face recertification (FFR) interview is all that is required to stop the **G10** or **G20** closing. If staff selects "No" a warning message will pop up indicating that the processing of the SIC activity cannot continue.

Must answer "Yes" if participant reports for the FFR.	

Note: If the participant does not have all of their documents, the SIC activity for the **G10** or **G20** <u>must still</u> be completed and the participant must be given the Documentation Requirements and/or Assessment Follow-Up (**W-113K**) form to return any outstanding documentation.

After responding "Yes" POS will attempt to pre-fill the "System Result" with the most recent POS activity and will then pre-select the "Recertification Interview" selection. If POS does not pre-fill this field, staff must manually select "Recertification Interview" and then click the "XMIT" button. After clicking this button, POS will send the SIC transaction to WMS to remove the pending **G10** or **G20** closing. Staff must click "Next" to launch the Recertification Interview Activity.

Details screen

Staff must conduct the FFR and provide a **W-113K** for any outstanding documents.

Mandatory/Non-Mandatory Documents

If the participant fails to comply with the **W-113K** for any mandatory documents, the case must be closed **V20** (Failure to Provide Verification).

If the only documents outstanding are not mandatory documents (i.e. proof of rental expense, proof of medical expenses), the recertification must be completed without the expense or information included on the budget.

Effective Immediately