OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #18-22-SYS

SNAP STREAMLINED POS VERSION 2.0

Date: April 17, 2018	**Subtopic(s):** POS
Please use Print on Demand to obtain copies of forms.	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) will migrate into production on May 9, 2018. Descriptions of the changes can be found in SNAP POS Release Notes Streamlined POS Version 2.0 (**Attachment A**). These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx *Effective May 9, 2018* **Attachment:** **Attachment A** SNAP POS Release Notes Streamlined POS Version 2.0

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

Attachment A

SNAP POS Release Notes

Streamlined POS Version 2.0 May 9, 2018

These Release Notes contain descriptions of changes in Supplemental Nutritional Assistance Program (SNAP) Streamlined POS Release 2.0 Enhancements scheduled for May, 2018. 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. Streamlined POS (SPOS) Version 2.0 Overview

SPOS Version 2.0 was updated with new functionality, new matches, enhancements and cross-edits to improve the processing of the SNAP (Supplemental Nutrition Assistance Program) application interview, the SNAP recertification interview and the SNAP change case data activities.

The following enhancements were added to this release:

1. Integration of State Data Exchange (SDX) match from WMS (Welfare Management System) for Supplemental Security Income (SSI) Benefits.
2. Display of Social Security Administration (SSA) Resource File Integration (RFI) matches for Social Security Numbers (SSN) and posting of RFI (Resource File Integration) resolution code for unresolved SSA RFI matches for SSN in the **Individual Details** section.
3. Posting of RFI Resolution for unresolved Wage Reporting System (WRS), New Hire and Unemployment Insurance Benefit (UIB) RFI matches in the Income section.
4. Posting of RFI Resolution for unresolved Bank RFI matches in the **Resources** section.
5. Automated RFI resolution for Bank matches on categorically eligible cases.
6. New data-entry fields for preferred name, title and pronoun in the **Individual Details** section.
7. New documentation options added in the **Individual Docs** section.
8. TALX alert for SNAP application interviews in Income Checklist.
9. Addition of alternative notice format options for blind/low vision clients in the **Medical Info** section.
10. New alerts for veterans, individuals marked as blind, low-vision, sick or disabled, and pregnant individuals.
11. New frequency options for temporary housing.
12. Shelter types added for **S15** (Supplemental Security Income [SSI] SNAP) cases and **S61** (Residential Facilities Center SNAP) cases.
13. New business rules for housing expenses.
14. New preset values and warning messages for utility expenses entered for applicants and participants that are homeless or in temporary housing.
15. Addition of Worker Center and Case Center in header of Streamlined POS (Paperless Office System).

The following SNAP activity types were updated with these SPOS enhancements:

- **SNAP Application Interview**
- **SNAP Recertification Interview**
- **SNAP Change Case Data**

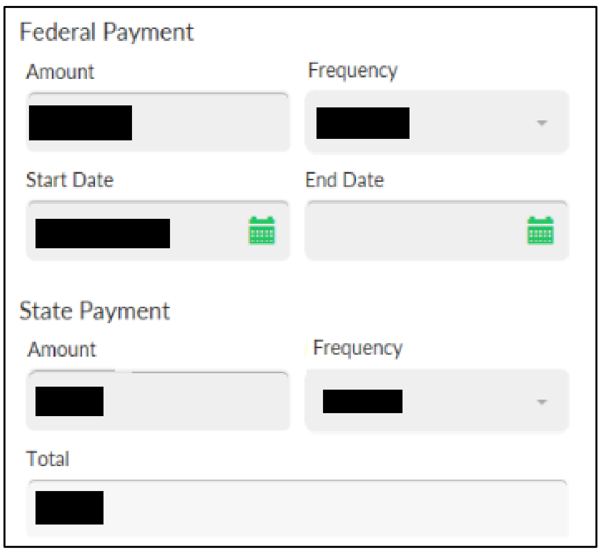
2. Integration of SDX Match in Streamlined POS

The SDX income match for SSI benefits from WMS was integrated into the **Income Checklist** and **Income Details** sections in Streamlined POS with the following indications:

- On the **Overview** section, in the Case Alerts area an alert "SSI match found" is displayed.
- On the **Income Checklist** section, if an SDX match is found for an individual, the SSI checkbox is pre-checked and shaded in blue to indicate a match.
- On the **Income Details** section, each SDX match appears a new row on the grid.
- Upon clicking on the **SDX match row** on the grid, it opens the same **Income Details** as the **SSI question**

The SDX match is verified upon receipt. Documentation must be submitted to dispute the match results, if applicable.

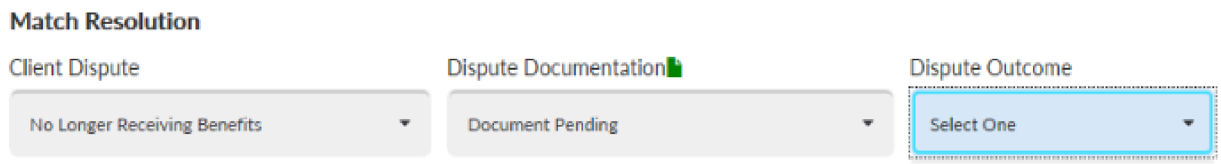
SDX Match fields (read-only)



Fields:

Federal Payment: Amount, Frequency, Start Date, End Date
State Payment: Amount, Frequency, Start Date, End Date
Total

Match Resolution



A brief description of the new fields for match resolution and their associated fields are as follows:

New field label	Field type and options (if applicable)	Required
Match Resolution / **Client Dispute**	Drop-down menu Options: • Match information is Accurate • Incorrect Amounts • Never received benefits • No longer receiving benefits	Yes
Dispute Documentation	Drop-down menu: • Document in hand • Document seen in viewer • Document pending Options for document selection: Acceptable documents for SSI benefits	Yes, if enabled
Dispute Results	Drop-down menu Options: • Document Satisfies Dispute • Document Does NOT Satisfy Dispute	Yes, if enabled
Detailed income panel for SSI	Section	

Selections in Match Resolution

When the option of **Match information is accurate** is selected, only the match information appears and the Detailed Income panel is not available. If there is no end date for the income, it carries over to the budget.

When the option of **Incorrect Amounts** is selected, the Worker must select the **Dispute Documentation** and **Dispute Results.** If the documentation satisfies the dispute, the Detailed Income panel for SSI opens and the Worker must enter the correct amount(s) for the SSI benefit.

When the option of **Never received benefits** is selected:

- he Worker must select the **Dispute Documentation** and **Dispute Results.** If the documentation satisfies the dispute, the Detailed Income panel for SSI opens and the Worker must enter an end date for the benefit and a detailed case comment. The Worker may need to complete a Bureau of Fraud Investigation (BFI) referral, following current policy.

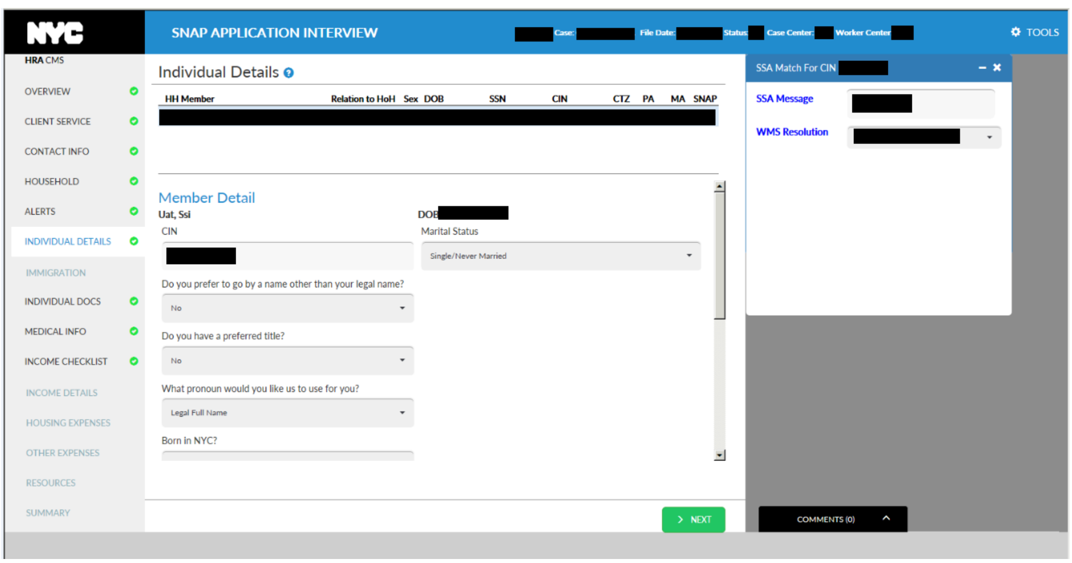
When the option of **No longer receiving benefits** is selected,

- he Worker must select the **Dispute Documentation** and **Dispute Results.** If the documentation satisfies the dispute, the detailed income panel for SSI opens and the Worker must enter an end date for the benefit and a detailed case comment.

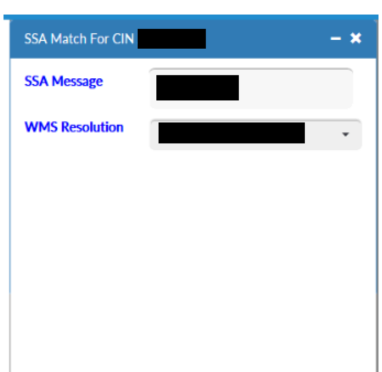
3. SSA RFI for SSN in Individual Details section

RFI matches for SSN received from the SSA were added to the **Individual Details** section. The match includes the SSA Message and allows the Worker to select a resolution for the RFI match.

Updated ***Individual Details*** *section*



SSA Match for SSN *panel*



***WMS Resolution** menu options and resolution codes transmitted to WMS*

WMS Match Resolution	Resolution Code transmitted to WMS
Decision has not been made	No code posted
Social Security Data Reviewed	P01
RFI hit data doesn’t affect eligibility	P05

Note: If the Worker must select a resolution based on the case or individual eligibility outcome (e.g. the individual was rejected based on the match) or needs to change the RFI resolution after initially selecting an option in Streamlined POS, they must access the RFI interface in Classic POS.

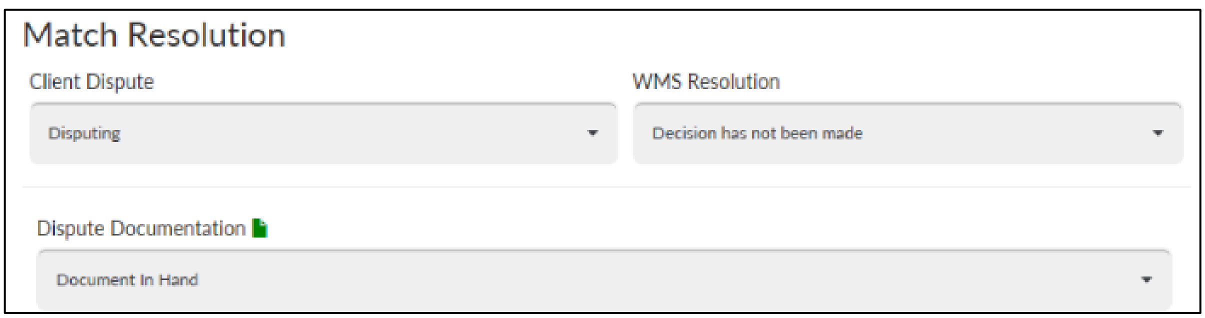
4. RFI Resolution for Income Matches

Streamlined POS was updated to allow posting of WMS resolution codes for RFI matches from the **Income Details** section. The Worker is now able to select and transmit a **WMS resolution code** for an unresolved RFI match, if the case is ready for posting.

The new drop-down menu named **WMS Resolution** appears when the Worker selects **Already Reported** or **Disputing** in the **Client Dispute** field.

The **WMS Resolution** option also appears when the Worker previously selected **Not Disputing or New Information**, entered the details and save the entries.

*New **WMS Resolution** drop-down menu*



***WMS Resolution** menu options and resolution codes transmitted to WMS*

WMS Resolution	Resolution Code transmitted to WMS
Decision has not been made	No code posted
RFI hit data doesn’t affect eligibility	P05
Income revealed by RFI already budgeted or reported	P07

Note: If the Worker must select a resolution based on the case or individual eligibility outcome (e.g. the individual was rejected based on the match) or needs to change the RFI resolution after initially selecting an option in Streamlined POS, they must access the RFI interface in Classic POS.

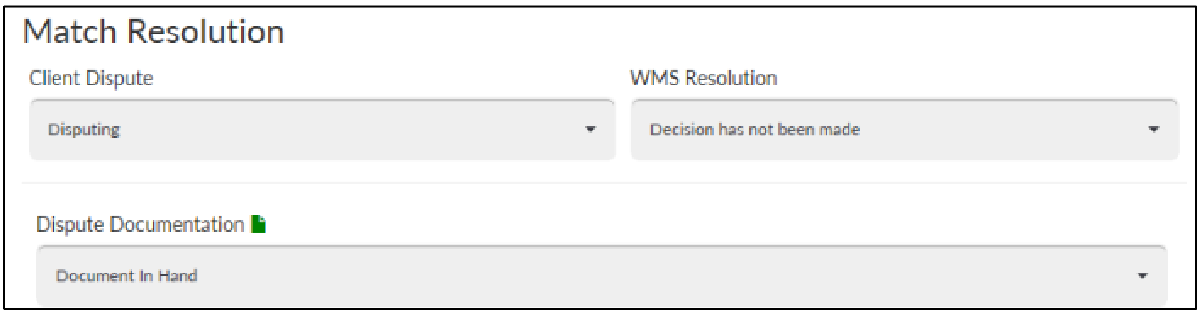
5. RFI Resolution for Bank Matches

Streamlined POS was updated to allow posting of WMS resolution codes for RFI bank matches in the **Resources** section for non-categorically eligible cases. The Worker can select and transmit a **WMS resolution code** for an unresolved Bank RFI match, if the case is ready for posting.

The new drop-down menu named **WMS Resolution** appears when the Worker selects **Already Reported** or **Disputing** in the **Client Dispute** field.

The **WMS Resolution** option also appears when the Worker previously selected **Not Disputing or New Information**, entered the details and save the entries.

*New **WMS Resolution** drop-down menu*



***WMS Resolution** Menu options and resolution codes transmitted to WMS*

WMS Match Resolution	Resolution Code transmitted to WMS
Decision has not been made	No code posted
RFI hit data doesn't affect eligibility	P05

Automated RFI Resolution for Bank Matches on Categorically Eligible Cases

If the case is categorically eligible for SNAP, Streamlined POS was updated to post the resolution code **P05** (RFI hit data doesn't affect eligibility) to WMS when the Worker clicks the **Next** button in the Resources section.

Note: If the Worker must select a resolution based on the case or individual eligibility outcome (e.g. the individual was rejected based on the match) or needs to change the RFI resolution after initially selecting an option in Streamlined POS, they must access the RFI interface in Classic POS.

How to Change the RFI Resolution Code in Classic POS

Once the worker enters the Resolution Code in SPOS they are unable to change it, he/she have to go to Classic POS to change the resolution code.

- To access CLASSIC POS from **SPOS** or **CTI,** after completing all the sections of the interview, the Worker will arrive at the final **Summary section** of **SPOS**, then click on **Continue to Process** which will bring them to Classic POS.

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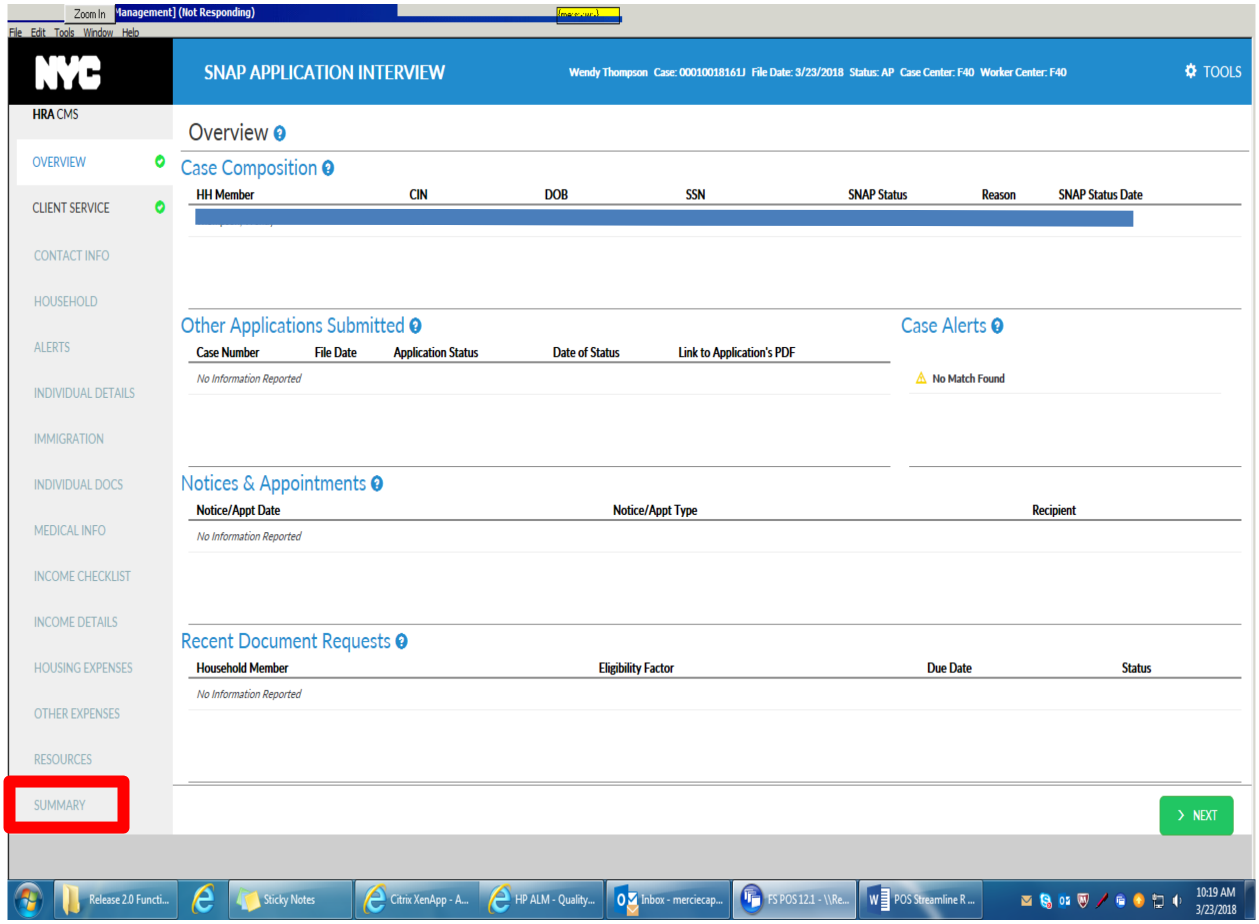
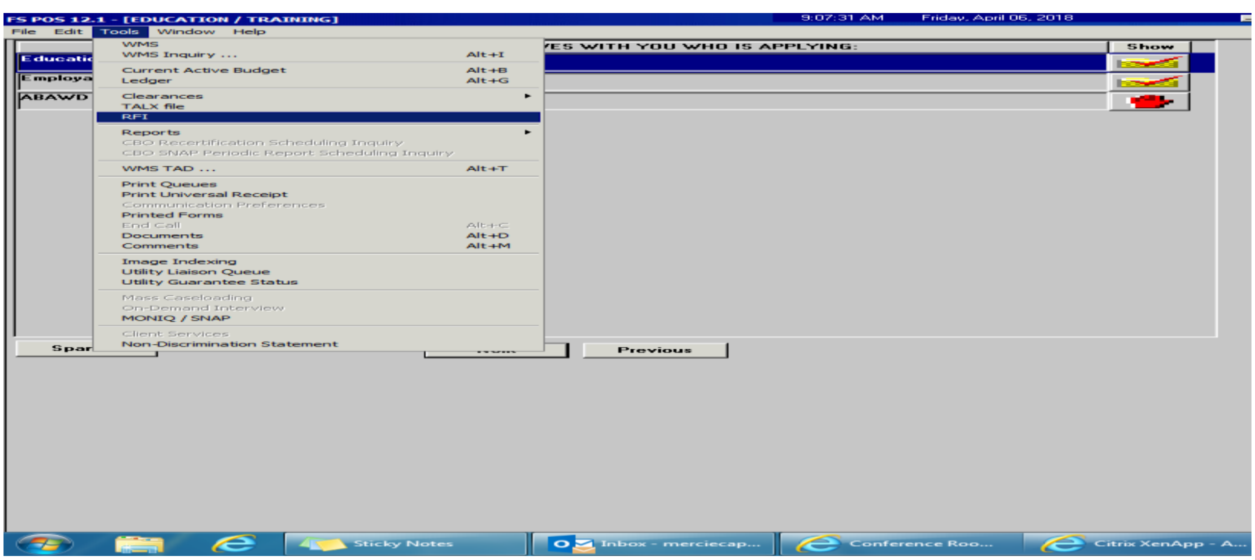


- Once in Classic POS, the Worker will go to the Tools menu and select/click on RFI to change the incorrect resolution code.

RFI Access from Classic POS



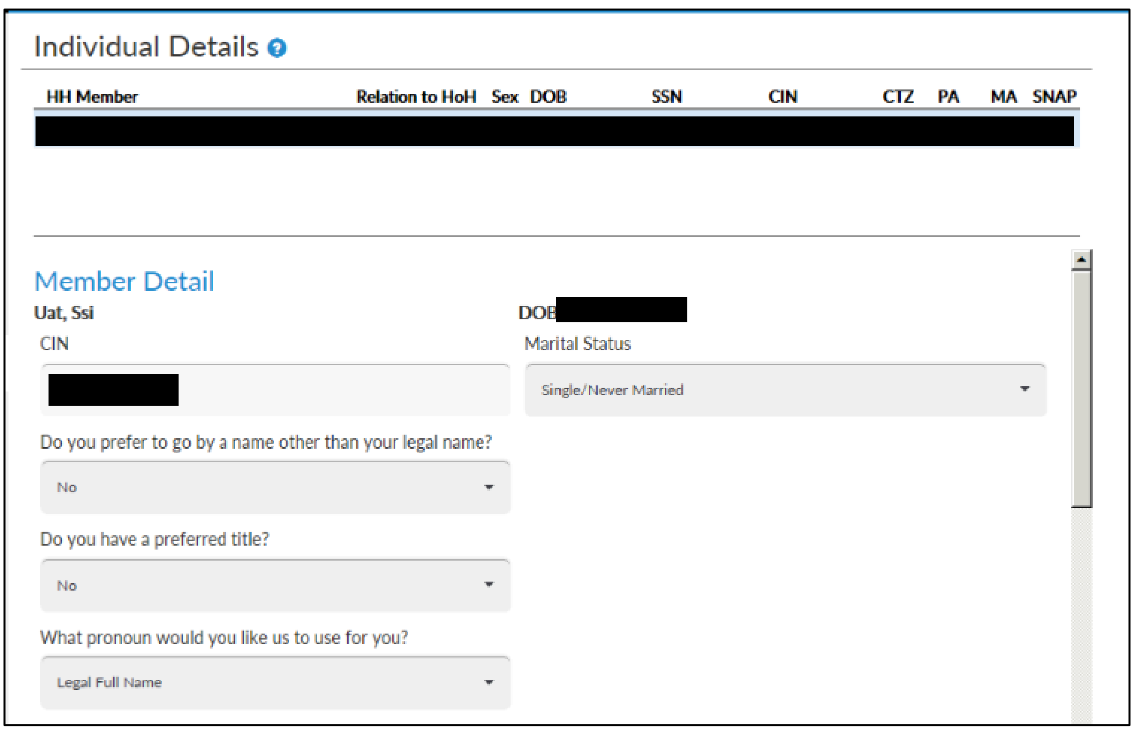
6. Preferred Name, Title and Pronoun Fields in Individual Details

SPOS was updated to allow capture of the preferred name, preferred title and preferred pronoun for any individual aged 16 years or older in the household.

A brief description of the new questions and their associated fields are as follows:

New field label	Field type and options applicable)
Do you prefer to go by a name other than your legal name?	Question with drop-down menu: Yes, No, Edit
Preferred Name	Text box
Do you have a preferred title?	Question with drop-down menu: • Yes, No, Edit
Preferred title	Drop-down menu: • Mr., Ms., Mrs., Miss, Mx., Dr.
What pronoun would you like us to use for you?	Drop-down menu: • She/her, He/him, They/them, Zie/hir, Legal First Name, Legal Last Name, Legal Full Name, None

*Updated **Individual Details** section*



7. Updates for Naturalized Citizens in Individual Details

If a household member was previously an immigrant **meaning the alien/citizenship indicator ACI code was not C (Citizen)** and the Worker indicates that the household member is **now a citizen, SPOS** opens two additional fields underneath the US Citizen/National question:

- **Certificate of Naturalization/Passport Number**
- **Date of Naturalization**

For these individuals, the immigration flow does not appear and the previous immigration information no longer appears in the window.

Historical data is saved in the POS review module.

Note: If the Worker changes the answer of the **US Citizen/National question** to **Yes** and saves the entry via the **Save Changes** button or the **Next** button, the previous answers in the immigration flow are removed.

8. Updates to Documentation Options in Individual Docs

The following updates were made for documentation in Streamlined POS.

New Documentation options for Citizenship, Household Composition, Identity, Age and Residence

The following **new** options were added in the window for the **Documentation** field in the **Individual Docs** section:

Eligibility Factor	New option(s)
Citizenship	Client Attestation
Household Composition	Client Attestation, Collateral Call
Identity	Client Attestation
Age	Collateral Contact
Residence	Collateral Contact

Updates to Identity Documentation from Immigration flow

Documents selected during the immigration flow now update the **Individual Docs** section when it is also acceptable for identity and age.

9. TALX Alert in Income Checklist for SNAP Application Interview

A new alert appears for TALX in the **Income Checklist** section for the **SNAP Application Interview**: "**You must manually check TALX for all individuals over age 16 on this case.**"

- If the Worker does not click on the TALX Express link in the SNAP Application Interview, the following error message appears: **"You must click on the TALX link in order to continue"**

Note: There are existing alerts when an individual is added to the case in the SNAP application interview, recertification and change case data activities.

10. Alternative Format for Written Notices for Blind/Low Vision in Medical Info Section

For the question "**Is Daily activity limited because of an illness/temporary disability or is blind/low vision, sick or disabled**" a new field named **Alternative Format for Written Notices for Blind or Low Vision** appears when the applicant/participant is marked as **Blind / Low Vision** in the **Daily Activity Limited Due To** field:

New field label	Field type and options	Required
Alternative Format for Written Notices for Blind or Low Vision	Drop-down menu. Options: -None -Large Print -Data CD -Audio CD -Braille	Yes

11. Alerts for Medical Info and Income Sections

New alerts and error messages were added for veterans, individuals marked as sick, disabled, blind or low vision, and for pregnant individuals.

Alert for Veterans in Medical Info Section

A new alert message appears for the Worker in the **Medical Info** section for individuals who are identified as veterans in the **Individual Details** section (Special Disabled Veteran [Disability of 30% or more], Vietnam-era Veteran, Disabled Veteran, Combat Theater Veteran, Recently Separated Veteran): "**Ask about any medical issues.**"

Alert for potential Medical Assistance (MA) benefits for pregnant individual

If the individual is marked as pregnant in the **Individual Details** section**,** the following alert appears: "**Inform the client they may be eligible for medical assistance benefits.**"

Alert for Blind/Sick/Disabled Applicant/participants In Income Checklist

A new alert message appears for the Worker in the **Income Checklist** section when any applicant/participant has been **identified as blind, sick or disabled** in the **Medical Info** section: "**Ask about SSI or disability benefits.**"

Alert for Veterans In Income Details Section

A new alert message appears for the Worker in the **Income Details** section for individuals who are identified as veterans in the **Individual Details** section (Special Disabled Veteran [Disability of 30% or more], Vietnam-era Veteran, Disabled Veteran, Combat Theater Veteran, Recently Separated Veteran): "**Ask about veteran's or disability benefits.**"

New error message in Individual Details

If the Worker selects a choice other than "Non-Veteran" for a child under 18 years old, the following error message appears: "**Please check response to US Military/Veteran question - A child under 18 years of age cannot be anything other than a Non Veteran**."

New business rule in Medical Info to prevent duplicate entries

A new business rule was added to prevent duplicate selection and entry of medical issues for the same individual.

12. Updates for Temporary Housing Frequencies in Housing Expenses Section

The **Frequency** field in the **Temporary Housing** section was updated to allow capture of payment by additional hotel and temporary housing frequencies:

- Per Night
- Per Night Per Person

13. Additional Shelter Types for S15 (SSI) and S61 (Residential Treatment) Centers

For **S15** cases, the following shelter types were added:

- SSI High Shelter/Full SUA (**94**)
- SSI Low Shelter/Full SUA (**95**)
- SSI High Shelter/Full SUA (**96**)
- SSI Low Shelter/Full SUA (**97**)
- SSI Unknown Shelter/SUA (**98**)

For **S61** cases, the following shelter type was added under the **Congregate Care** section:

- Level 2-- State Operated (**17**)

14. New business rules in Housing Expenses section

The following business rules were added in the **Housing Expenses** section:

- Documentation will not be required when the individual is Undomiciled and **Street Homeless** (Shelter Code **23**) is selected as the shelter type.
- Entry of a shelter expense will not be required when the individual is Undomiciled and **Street Homeless** (Shelter Code **23**) is selected as the shelter type.
- Documentation will not be required for utilities when the individual is Undomiciled and **Street Homeless** (Shelter Code **23**) is selected as the shelter type.
- A new alert message for the Worker appears if **Contribution and Gifts are** recorded in the Income Details page: "**Check shelter expense and utility expenses.**"

15. Edits for Utility Expenses for Homeless, Congregate Care and Temporary Housing in Housing Expenses section

The following updates were made to the Housing Expenses section for utility expenses:

- The heating, gas, electric and water expense questions are pre-set to **No** if the shelter type is selected as Congregate Care, Street Homeless or Temporary Housing.
- A new warning message appears if the heating, gas, electric, and water expense questions have an answer of **Yes** and the applicant/participant's housing type is selected as Street Homeless: "**Utility expense entered for homeless client**"
- A new warning message appears if the heating, gas, electric, and water expense questions have an answer of **Yes** and the applicant/participant's housing type is selected as congregate care: **"Utility expense entered for congregate care client"**

16. Addition of Case Center and Worker to Streamlined POS Header

The Case Center and Worker Center were added to the header section in Streamlined POS, to the right of the **File Date** and **Status** fields: