



OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #21-16-SYS

(This policy bulletin replaces PB #21-10-SYS)

SNAP POS RELEASE NOTES STREAMLINED POS VERSION 4.1

<p>Date: March 17, 2021</p>	<p>Subtopic(s): POS</p>
	<p>Revisions to the Original Policy Bulletin</p> <p>This policy bulletin has been revised to add new dates for the release of Streamlined POS 4.1 for the pilot rollout of Telephone Interview Processing (TIPS 24) and the citywide rollout of TIPS 42, Social Security Income (S15), Residential Facilities Center (S61) and Mailer and Match Action Program (MMAP).</p> <p>Purpose:</p> <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) will migrate into production on March 29, 2021. Descriptions of the changes can be found in Streamlined POS Release 4.1 (Attachment A – Workers Activities), and (Attachment B – New Features and Functionality).</p> <p>The pilot rollout for TIPS 24 is March 29, 2021. The planned citywide release date for TIPS 42, S15, Residential Facilities Center (S61) and MMAP is April 26, 2021.</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 March 29, 2021</i></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

Attachments:

Attachment A Workers Activities

Attachment B New Features and Functionality

Streamlined POS Release Notes

Version 4.1, Spring 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.1 for Monday, March 29, 2021. 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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Streamlined POS Release Notes

Version 4.1, Spring 2021

1. Overview of Changes

The Streamlined POS (SPOS) project aims to modernize and improve the interview, change actions and processing for staff in the Paperless Office System (POS) in the Supplemental Nutrition Assistance Program (SNAP) area of FIA (Family Independence Administration), including interviewers, processors, supervisors, and reviewers.

In this release of Streamlined POS, all remaining Classic POS activities will launch into Streamlined POS when they are started. Workers can start activities depending upon the Worker's role and the desired action on the case from Classic POS action menu or from their POS queue. Approval actions can be started by Supervisors and above.

- The Worker selects the activity from the **Action Menu** and presses **Start**. On the **Choose a Case** window, type in the desired case number and click the **Search** button. Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the activity in Streamline POS.

The following Classic POS activities are introduced in Streamline POS Release 4.1:

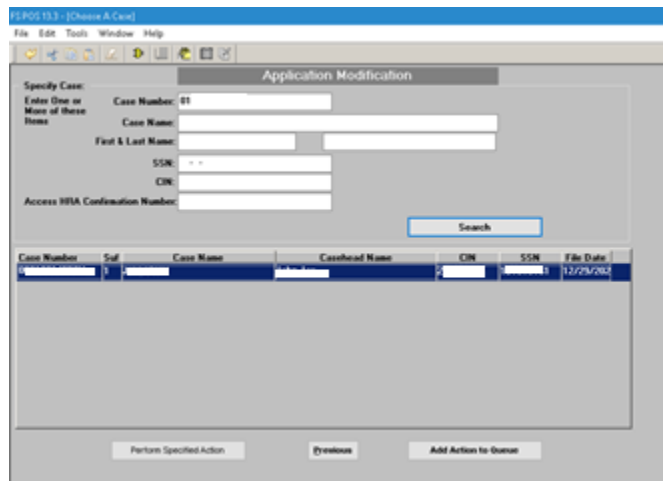
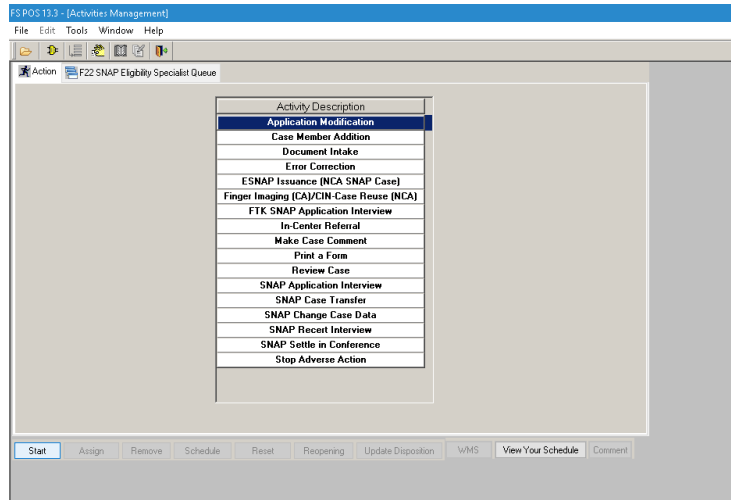
- **Application Modification**
- **Case Member Addition**
- **Make Case Comment**
- **SNAP Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Document Intake**
- **Fail to Keep SNAP Application Interview** and **EC- Fail to Keep SNAP Application Interview**
- **Approve Fail to Keep SNAP Application Interview** and **Approve EC- Fail to Keep SNAP Application Interview**
- **SNAP Case Transfer**
- **Approve SNAP Case Transfer**

2. Application Modification

- Select **Application Modification** from the **Classic POS Action Menu** and click on the **Start** button to begin an **Application Modification** on a case.
- Type the desired case number and click the **Search** button on the **Choose a Case** window.
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **Application Modification** activity in Streamline POS.

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The Worker can access the correct SPOS action to add household members or to update addresses on a case. A **Choose Activity** dialog box appears below to ask, “Do you want to start the application interview?” Click a **Yes** or **No** response.

Choose Activity

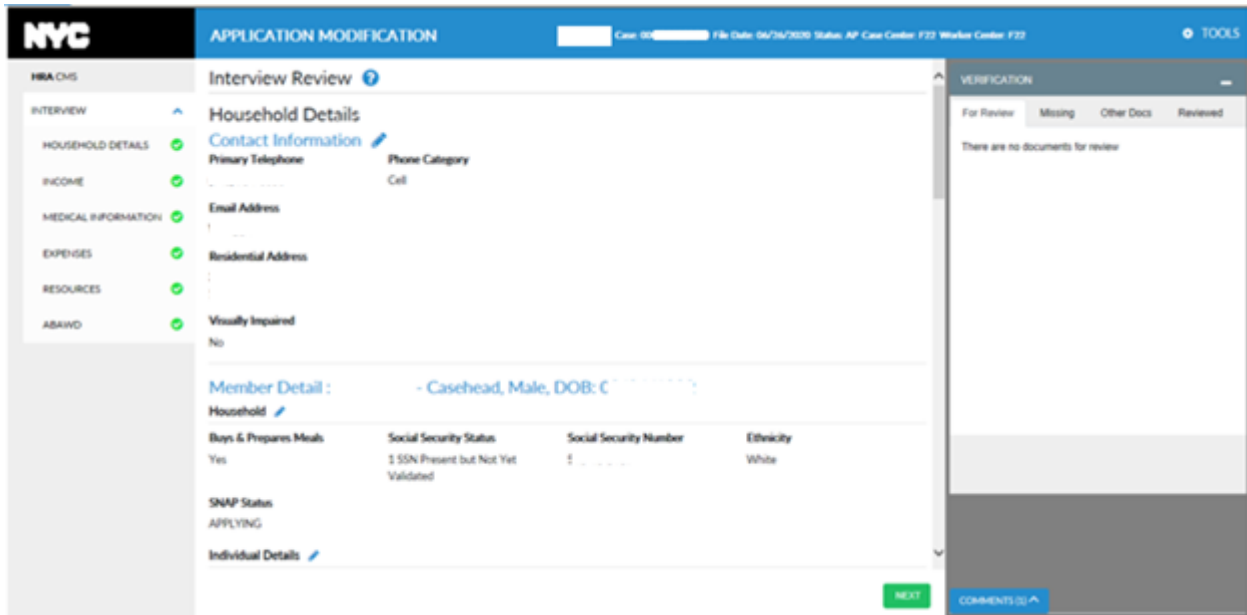
Do you want to start the Application Interview for this case?

If **Yes** is selected, the **SNAP Application Interview** activity for that case will open.

If the Worker decides not to start the **SNAP Application Interview**, the system will only open the standalone **SNAP Application Modification** module.

Streamlined POS Release Notes

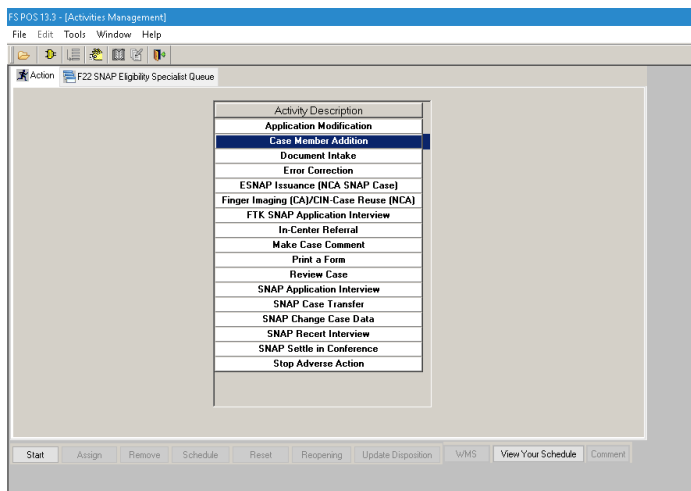
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3. Case Member Addition

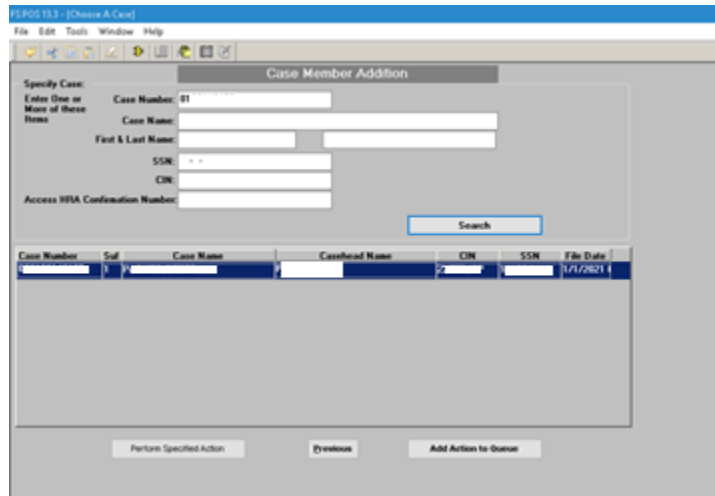
- To begin, select **Case Member Addition** from the **Classic POS Action Menu** and click on the **Start** button.
- Type the desired case number and click the **Search** button on the **Choose a Case** window.
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch Streamline POS.

Case Member Addition is replaced with opening **SNAP Change Case Data** or **SNAP Recertification Interview** activities in Streamline POS. From these activities, case members can be added to the household as needed. There will be no stand-alone **Case Member Addition** action, and the Worker can start the *Case Member Addition* for a case when the case is in Single Issue (**SI**) or Active (**AC**) status in the Welfare Management System (WMS).



Streamlined POS Release Notes

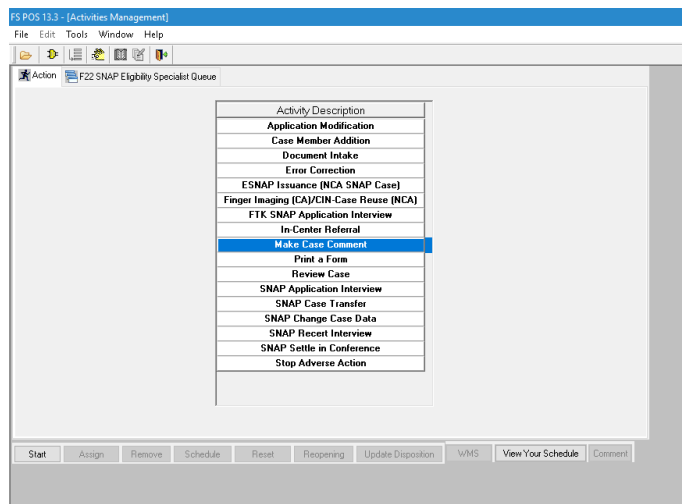
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- Click **Perform Specified Action** to launch **SNAP Change Case Data** or **SNAP Recertification Interview** activities in Streamline POS.

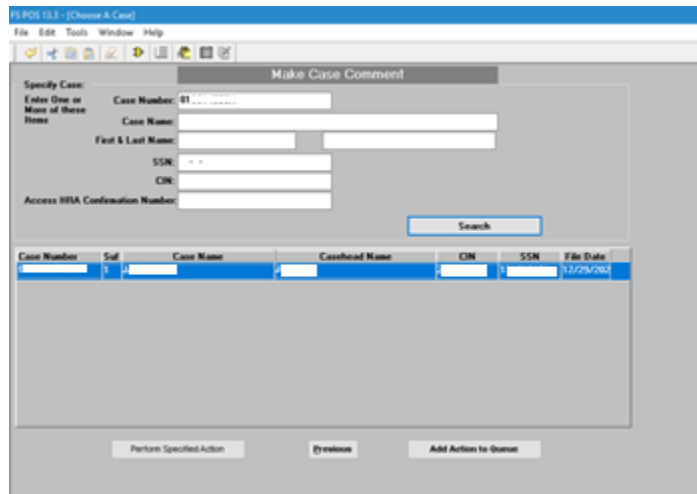
4. Make Case Comment

- Select **Make Case Comment** from the **Classic POS Action Menu** and click on the **Start** button to begin a **Make Case Comment** activity on a case,
- Type the desired case number and click the **Search** button on the **Choose a Case** window.
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **Make Case Comment** activity in Streamline POS.



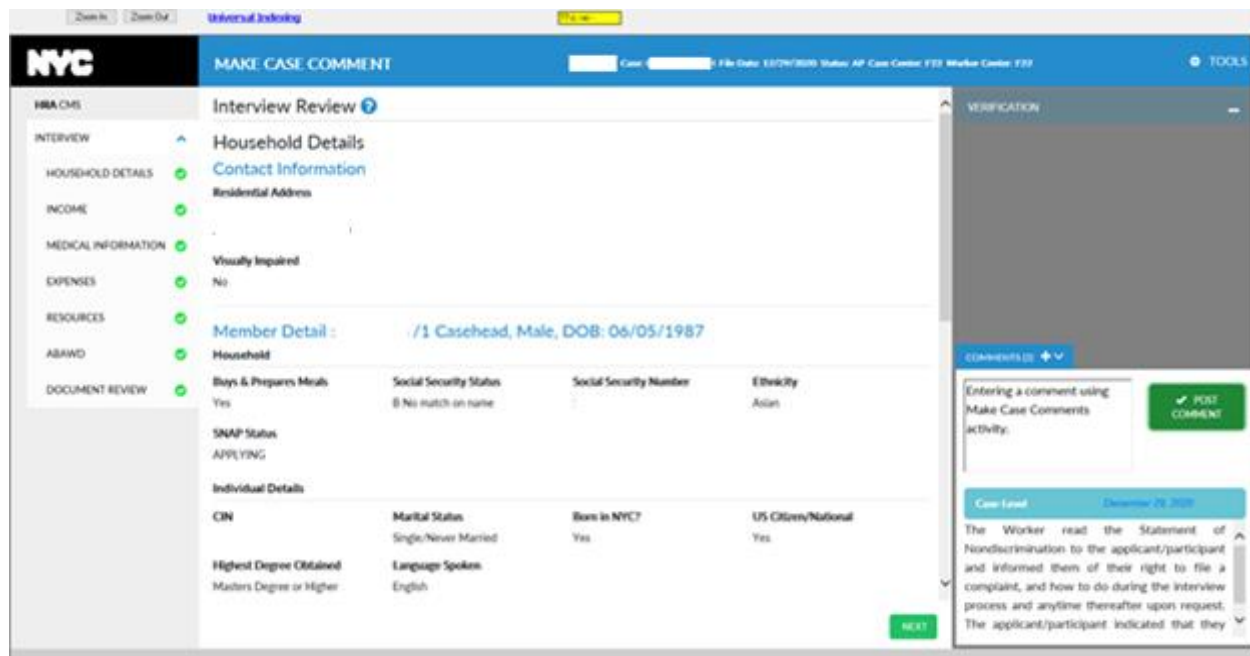
Streamlined POS Release Notes

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The **Make Case Comment** activity will now launch in SPOS.

- Workers have the ability to make a detailed **Case Comment** in SPOS for any events or actions on the case that take place outside of the system.
- Use the **Comments** widget on the right side to enter comments – click the **Post Comment** button when finished typing in the comment. The Worker can see the comment history under the **Tools Menu**.



Streamlined POS Release Notes

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NYC MAKE CASE COMMENT

Case: [Redacted] File Date: 12/07/2020 Status: AP Case Center: F22 Worker Center: F22

Interview Review

HOUSEHOLD DETAILS

Contact Information

Residential Address

INCOME

MEDICAL INFORMATION

Visually Impaired

EXPENSES

No

RESOURCES

ABAWD

DOCUMENT REVIEW

Member Detail: /1 Casehead, Male, DOB: 06/05/1987

Boys & Prepares Meals

Yes

Social Security Status

B No match on name

Social Security Number

Ethnicity

Asian

SNAP Status

APPLYING

Individual Details

CIN

Marital Status

Singly/Never Married

Born in NYC?

Yes

US Citizen/National

Yes

Highest Degree Obtained

Masters Degree or Higher

Language Spoken

English

VERIFICATION

- Matches Clearance
- Documents to One Viewer
- Comment History
- Temporary Housing Facilities (W-14500)
- WHS Search List
- Suspend Interview
- Universal Indexing
- Event Log
- WHS
- Microsoft Teams
- Report System Issue
- Help About

TOOLS

Next

Comments (2)

NYC MAKE CASE COMMENT

Case: [Redacted] File Date: 12/07/2020 Status: AP Case Center: F22 Worker Center: F22

COMMENT HISTORY

Date	Activity Sequence Number	Activity Description	Worker Name	Comment Type	Comment
01/15/2021	35	Make Case Comment		Case	Entering a comment using Make Case Comments activity.
12/09/2020	7	SNAP Application Interview		Case	The Worker read the Statement of Nondiscrimination to the applicant/participant and informed them of their right to file a complaint, and how to do during the interview process and anytime thereafter upon request. The applicant/participant indicated that they did not have any questions.

Displaying Record(s) 1-2 of 2 Items

Page 1 of 1

Close

Next

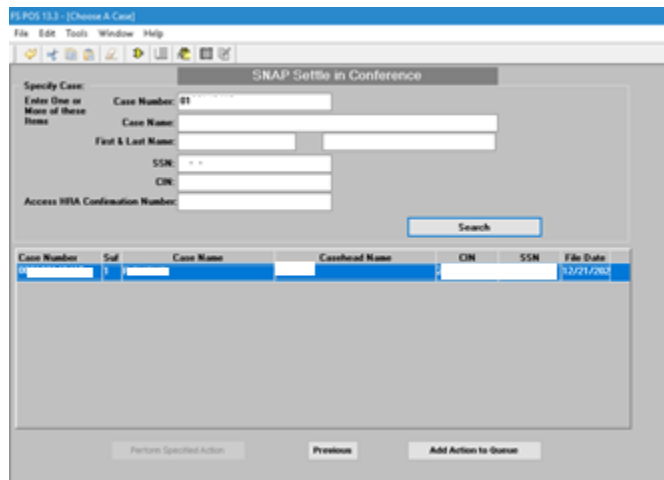
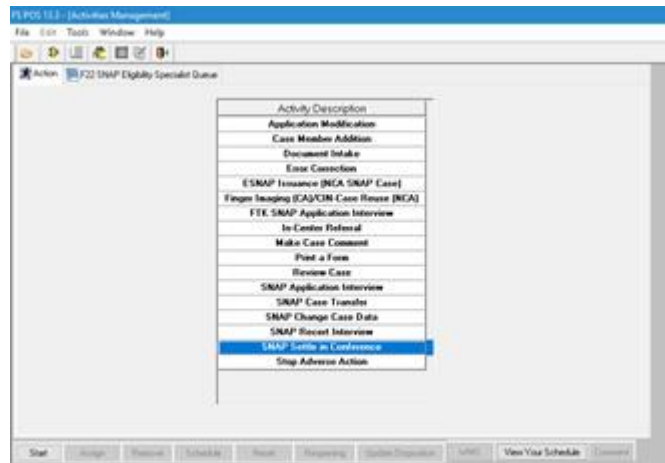
Comments (2)

5. SNAP Settle in Conference

- Select **SNAP Settle in Conference** from the **Classic POS Action Menu** and click on the **Start** button to begin a **SNAP Settle in Conference** activity on a case.
- Type the desired case number and click the **Search** button on the **Choose a Case** window..
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **SNAP Settle In Conference** activity in Streamline POS.

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The Worker can view pending transactions that are clocking down in WMS within the case that is being processed and can cancel the action if needed. The new **Transaction Details** section in the **Interview Review** screen includes **Transaction Number**, **Transaction Type**, and **Settle in Conference** or **Cancel Transaction**. The pencil icon allows the Worker to make required entries in a popup window.

- If the Worker answers **Yes** to the **Settle in Conference/Cancel** transaction then they must select a reason for the cancellation.
- The Worker can transmit the **Settle in Conference** for actions that are clocking down in WMS to stop the action if needed. The Worker can then continue to the next action or complete the current action.

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The screenshot shows the 'Interview Review' screen in the NYC system. The 'TRANSACTION DETAILS' section is active, displaying the following information:

Transaction number	Transaction type	Settle in conference/ cancel transaction?	Select reason for cancellation
99968956	Eligibility	No	N/A

Other sections visible include 'HOUSEHOLD DETAILS', 'MEDICAL INFORMATION', 'EXPENSES', 'RESOURCES', and 'ABAND'. The 'Member Detail' section shows: 1/1 Casehead, Male, DOB: [redacted]. The 'SNAP Status' is 'REJECTED'.

- Click the pencil icon to open the **Transaction Details** popup window. Select **Yes** for the **Settle in Conference/Cancel** transaction.
- Select the reason for cancellation and then click **Save Changes**.

The screenshot shows the 'Interview Review' screen with the 'TRANSACTION DETAILS' popup window open. The popup contains the following information:

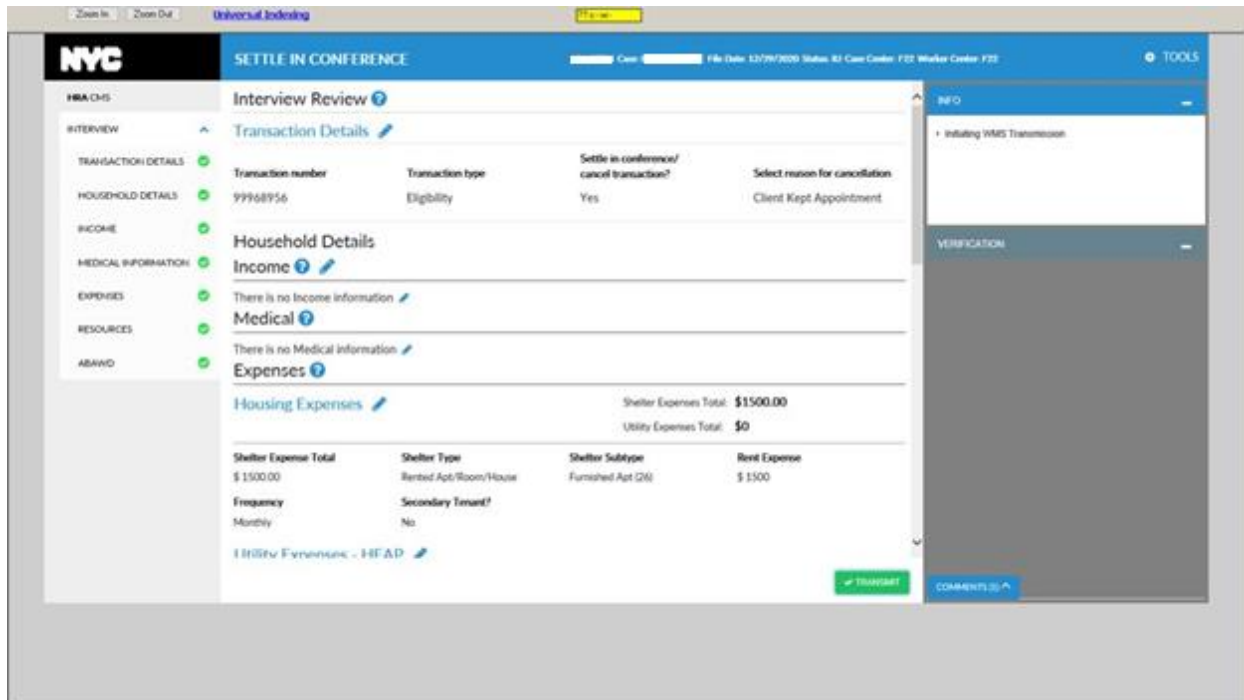
Transaction number	Transaction type	Settle in conference/ cancel transaction?	Select reason for cancellation
99968956	Eligibility	Yes	Client Kept Appointment

Buttons for 'DISCARD CHANGES' and 'SAVE CHANGES' are visible at the bottom of the popup. The background screen shows 'HOUSING EXPENSES' with a total of \$1500.00 for Shelter Expenses and \$0 for Utility Expenses.

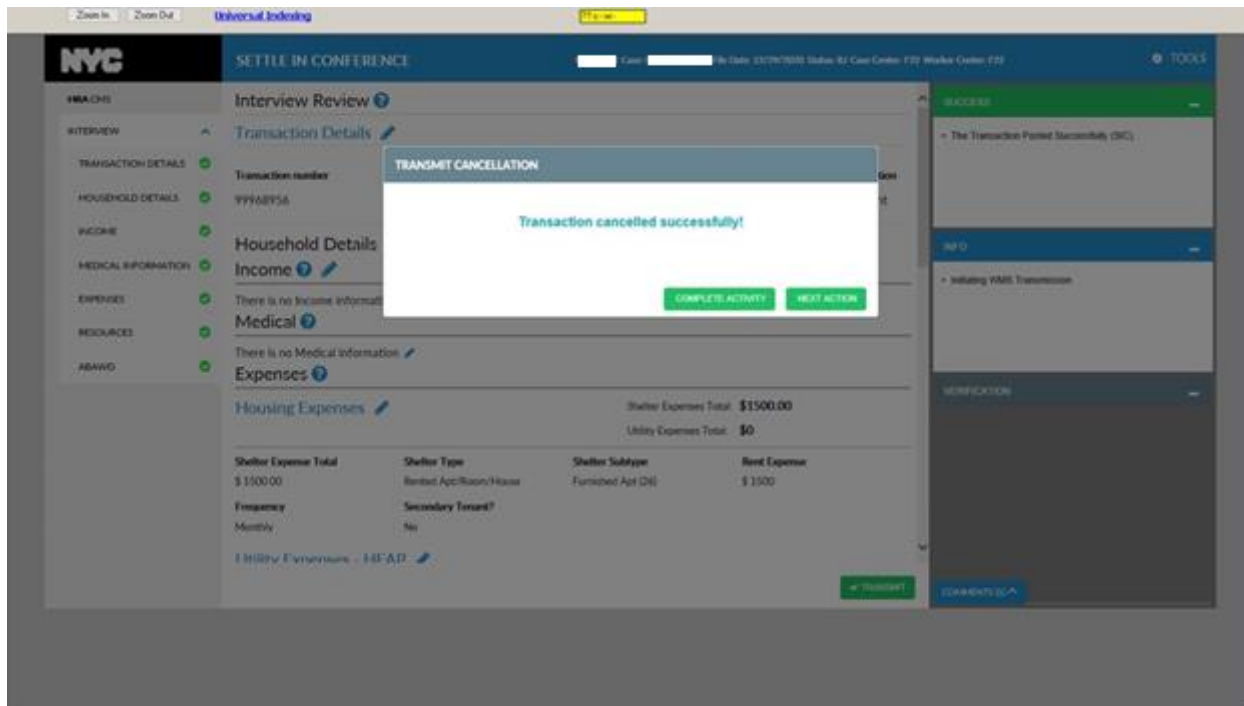
- Click on the **Transmit** button on the **Interview Review** screen, to send the **Settle in Conference** transaction to WMS. POS then initiates the transmission to WMS.

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The Worker will receive a notification that the transmission was sent successfully.

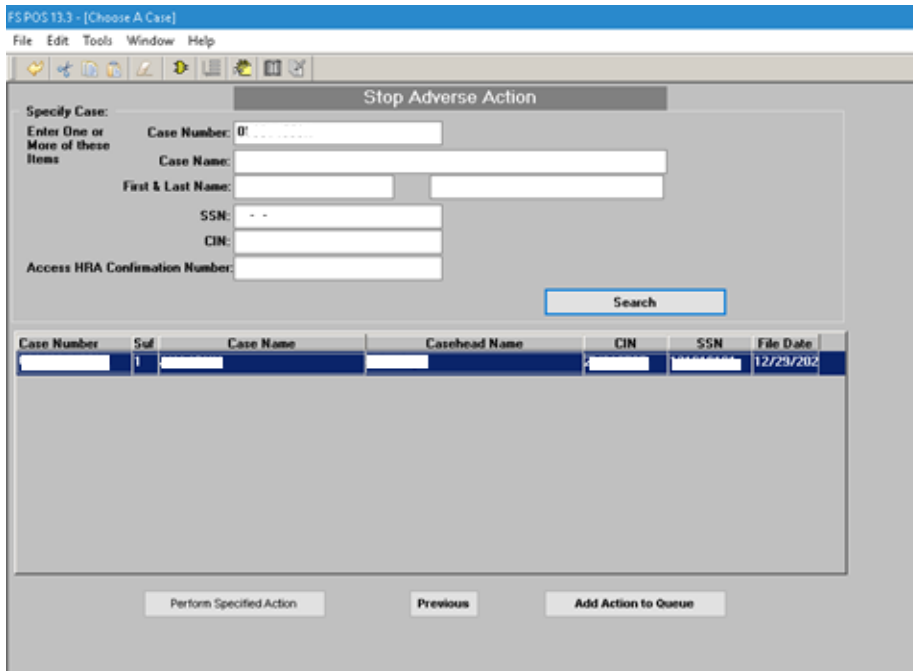
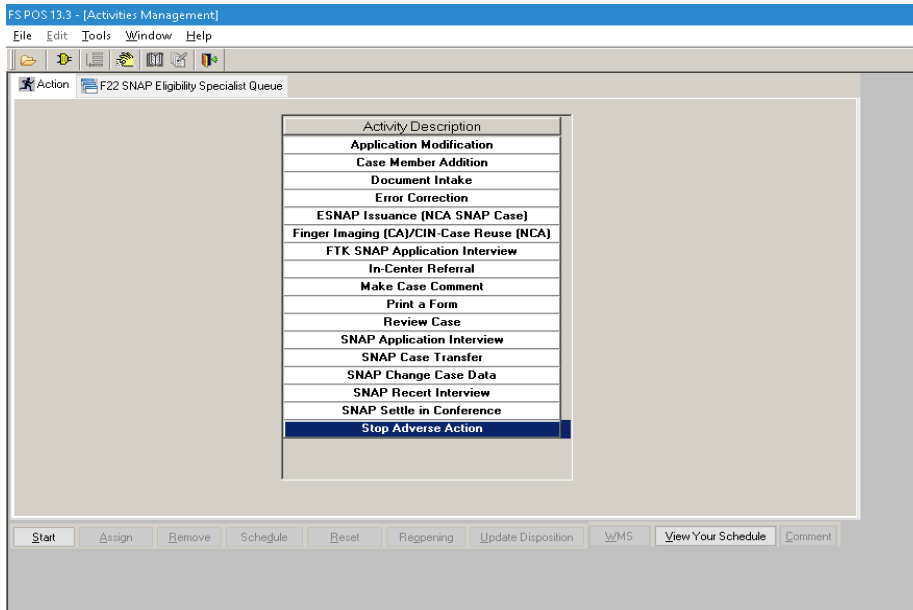


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6. Stop Adverse Action

- Select **Stop Adverse Action** from the **Classic POS Action Menu** and click on the **Start** button to begin a **Stop Adverse Action** activity on a case.
- Type the desired case number and click the **Search** button on the **Choose a Case** window.
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **Stop Adverse Action** activity in Streamline POS.



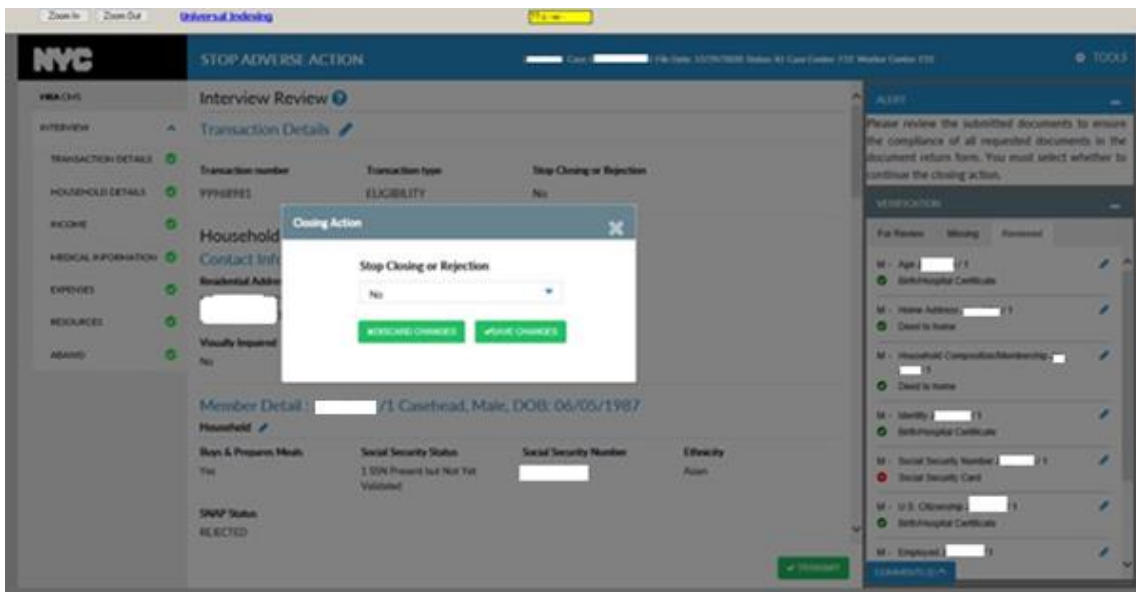
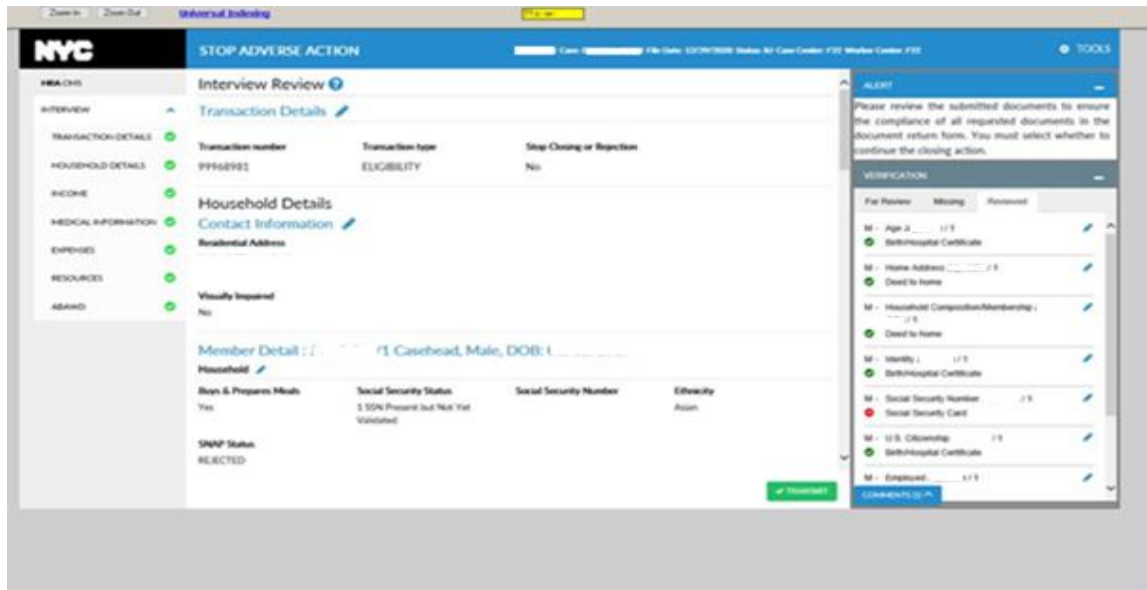
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In SPOS 4, the processor can access **Stop Adverse Action** functionality when mandated documents are submitted by the applicant or participant while a closing for failure to provide documentation/verification is clocking down to evaluate whether sufficient documentation was submitted to stop the closing and process the case. A pause action is automatically posted in WMS by POS and the processor uses the **Stop Adverse Action** activity to complete their review.

This activity includes the **Interview Review** Screen only with the **Verification Widget** enabled. There is a new **Transaction Details** section in **Interview Review** where the Worker is given the opportunity to stop the closing or rejection by clicking the pencil icon.

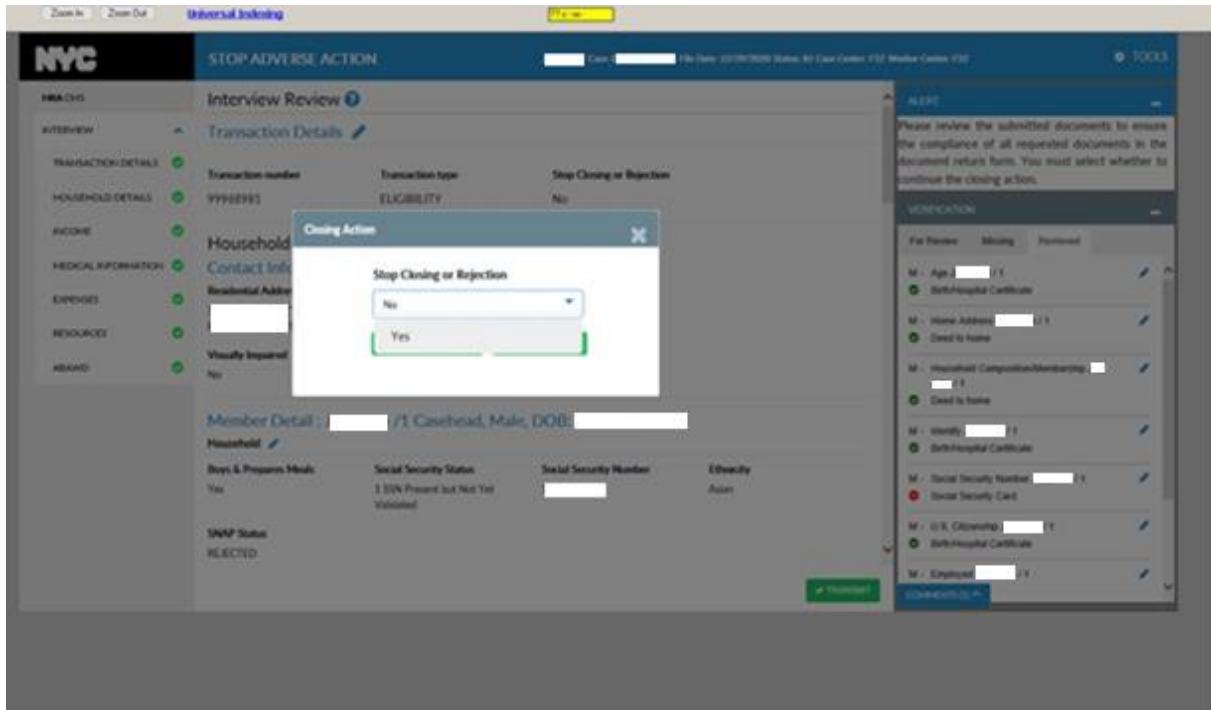
- The Worker can select **Yes** to stop the rejection or closing on the popup dialog box.. SPOS posts the transaction to WMS.



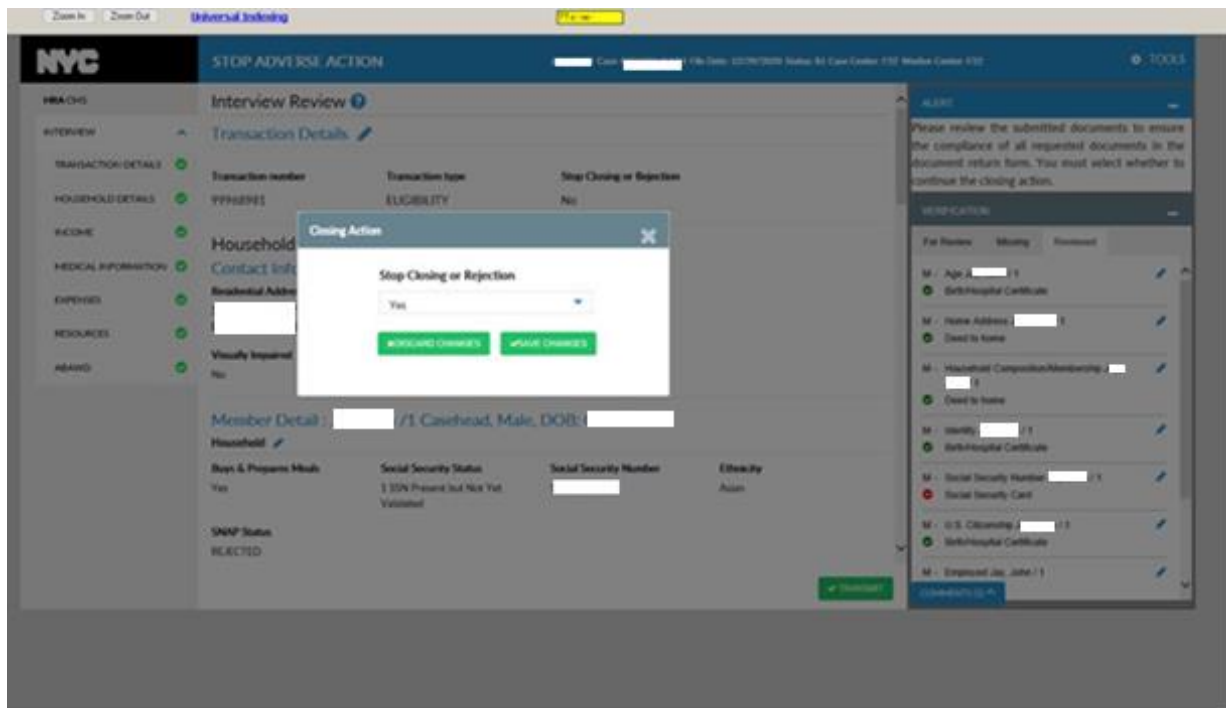
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- Select **Yes** in this dialog box to stop the action.



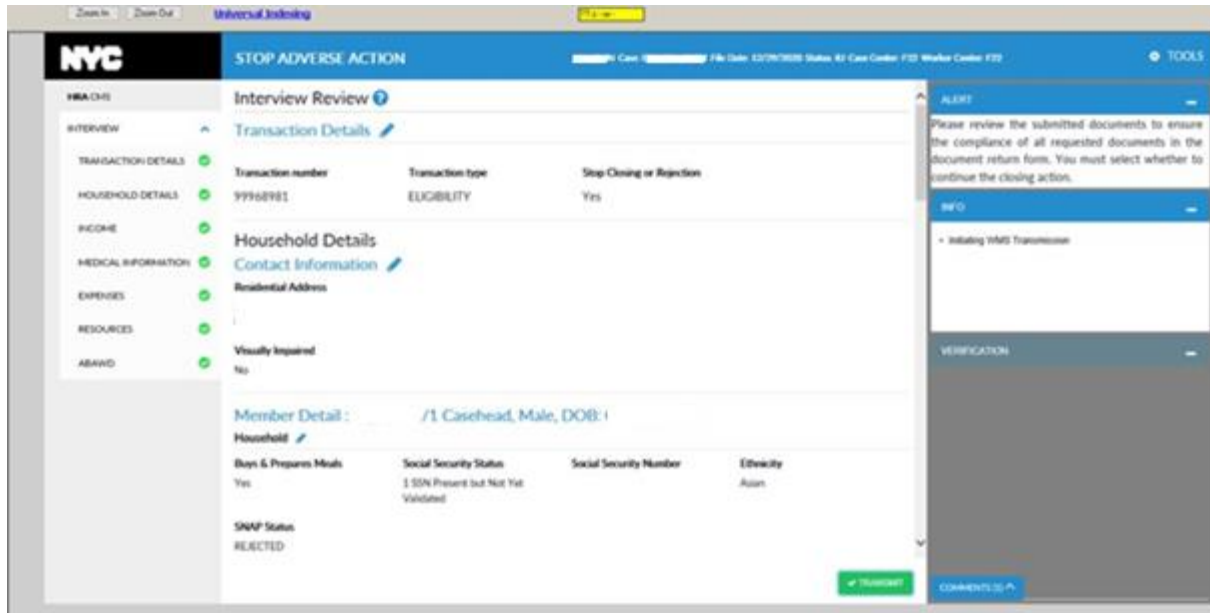
- Press **Save Changes**.



Streamlined POS Release Notes

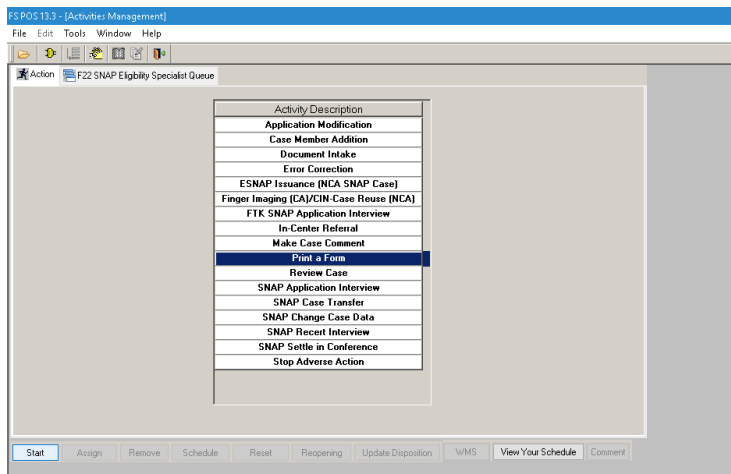
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- Click **Save Changes**, and the **Interview Review** screen will display with **Yes** in the **Stop Closing** field.
- Click the **Transmit** button on the bottom right to send this to WMS. The system will display an informational alert on the right side panel stating the WMS transmission has been initiated.



7. Print a Form

- Select **Print A Form** from the **Classic POS Action Menu** to begin the **Print a Form** activity on a case, and click on the **Start** button.
- Type the desired case number and click the Search button on the **Choose a Case** window.
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **Print a Form** activity in Streamline POS.



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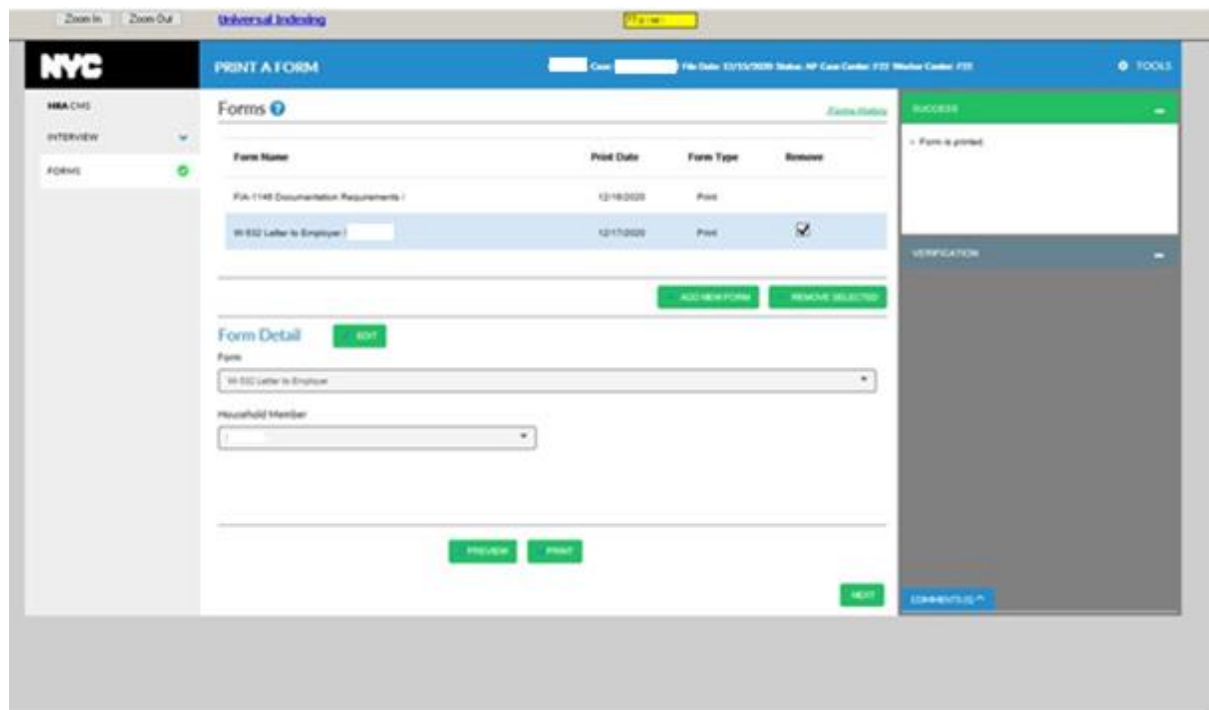
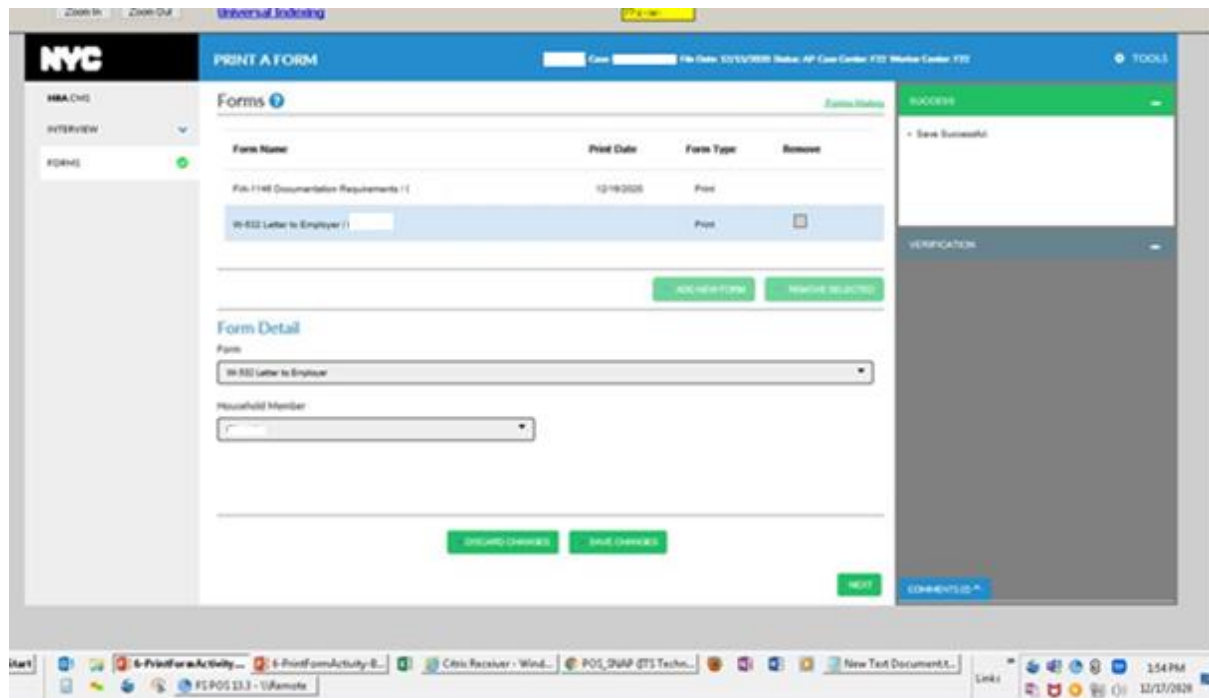
Workers can start the **Print a Form** activity which works without needing to access an application, recertification or change action and can be used whenever needed.

The **Print a Form** action includes the **Interview Review** and **Forms** screens. The **Interview Review** screen includes the **Verification** and **Comment Widget**.

- The Worker can add a form by clicking **Add New Form** and selecting any of forms available in the dropdown on the Forms screen. Fill out the data entry window if required and click **Save Changes**.
- Once the form has been added to the top grid, select it and click the **Print** button so it can be printed.

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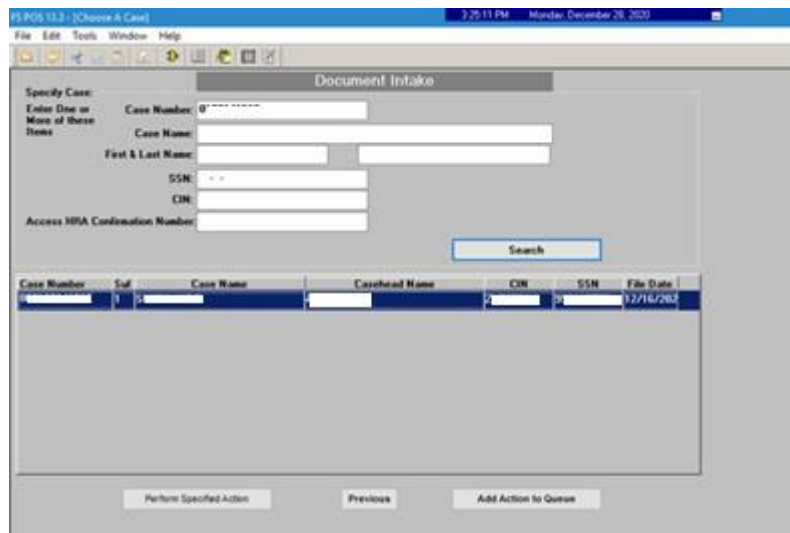
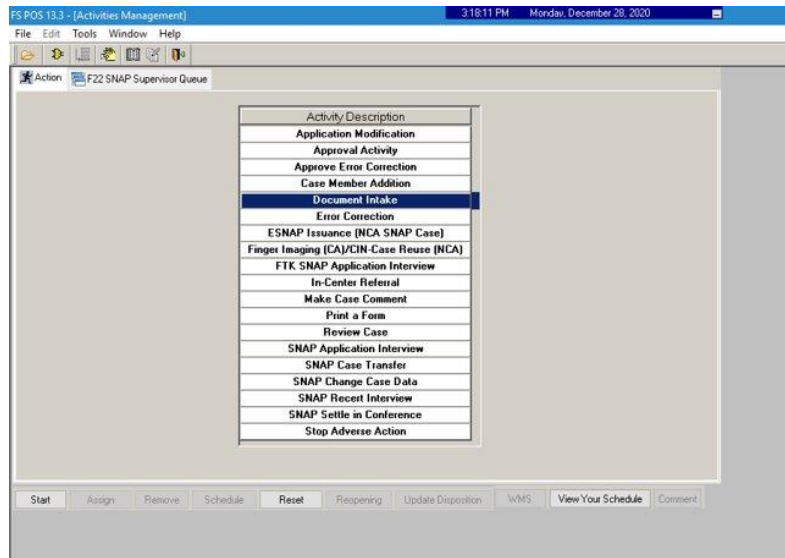


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8. Document Intake

- Select **Document Intake** from the **Classic POS Action Menu** and click on the **Start** button to begin a **Document Intake** activity on a case.
- Type in the desired case number and click the **Search** button on the **Choose a Case** window..
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **Document Intake** activity in Streamline POS.



- Click **Perform Specified Action** to launch the **Document Intake** activity in Streamline POS, which allows the Worker to start the **Universal Indexing Tool** to index scanned documents to the case.
- Click the **Open Universal Indexing** button on the bottom right.

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NYC DOCUMENT INTAKE

Interview Review

Household Details

Contact Information

Primary Telephone: _____ Phone Category: Cell

Residential Address: _____

Visually Impaired: No

Member Detail: 1 / 1 Casehead, Female, DOB: _____

Household

Boys & Prepares Meals	Social Security Status	Social Security Number	Ethnicity
Yes	0 No match on name	*****	Hispanic/Latino, White

SNAP Status: SINGLE ISSUE

Individual Details

CIN	Marital Status	Born in NYC?	US Citizen/National
*****	Widowed	Yes	Yes

Buttons: OPEN AN AFFIDAVIT RECORD, NEXT, COMMENTS

Verification Panel: For Review, Missing, Reviewed. There are no documents for review.

CENTRALIZED WEB INDEXING - DOCUMENT PREVIEW

Scanned Folder List

Search By: Case Number, Center

Case Number: 0001010540H Center: 000

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

View / Search Case Data

Select Search Criteria: Case Number

Case Number: 0001010540H

Search Results for WMS, (1) Results for Case Number 0001010540H

Case Number	SFX	Case Name	SSN	CIN	CTR/Status
0001010540H	00				0200A0000

Case Information

Case Number: 0001010540H Case Suffix: 00

Case: PS Program: PS, MA, 100, MA, PS, AP Status: _____ P.O. Box: _____

Case Folder: Address: 140 WEST 210 BROADWAY BROOKLYN, NY

Buttons: USE THIS LINK

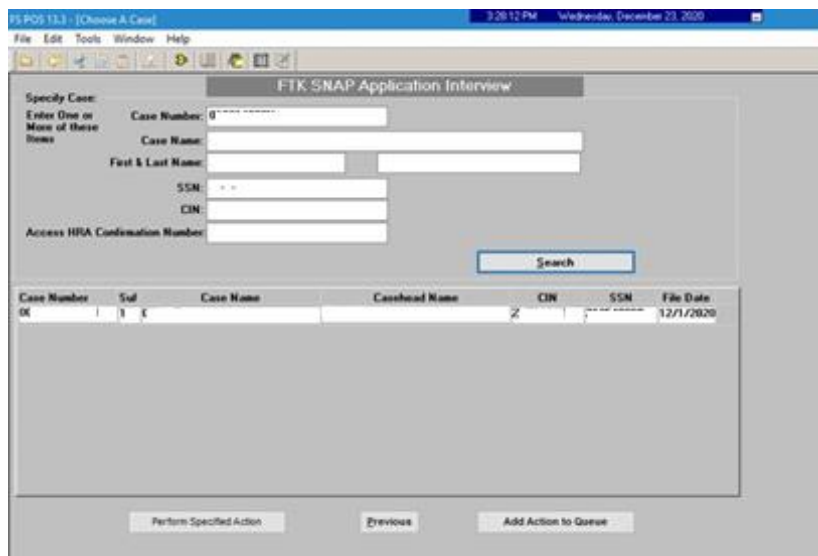
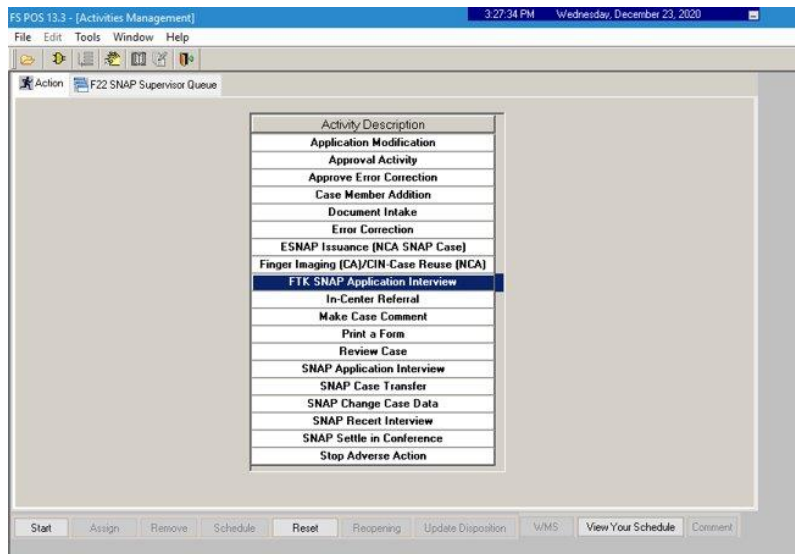
- Click **Tools** and **Exit** to return to the **Interview Review** screen in Streamline POS when finished indexing.

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9. Fail to Keep SNAP Application Interview and EC- Fail to Keep SNAP Application Interview Actions

- Select **FTK-SNAP Application Interview** from the **Classic POS Action Menu** and click on the **Start** button to begin a **Fail to Keep SNAP Application Interview** activity on a case..
- Type the desired case number and click the **Search** button on the **Choose a Case** window..
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **FTK-SNAP Application Interview** activity in Streamline POS. Similarly, the **EC-FTK SNAP Application Interview** action would be started in the same way.



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The **FTK-SNAP Application Interview** and **EC-FTK SNAP Application Interview** actions now launch in Streamline POS for the processor to process cases that failed the application interview so that the required denial of benefits can be processed. The Turnaround Document (TAD) is set up with a status of rejected and the status reason of **H12** (Failure to Keep/Complete Initial Eligibility On-Demand Interview) is used for these activities. Budget and Grant entries are disabled as these activities are only used to reject the case. **Fail to Keep** and **Error Correction Fail to Keep** activities are available in the following standard processor flow: **Overview, Interview Review, Budget, TAD, Grants, Forms** and **Processor Summary**.

- Submit the case to the Supervisor for approval on the **Processor Summary**..

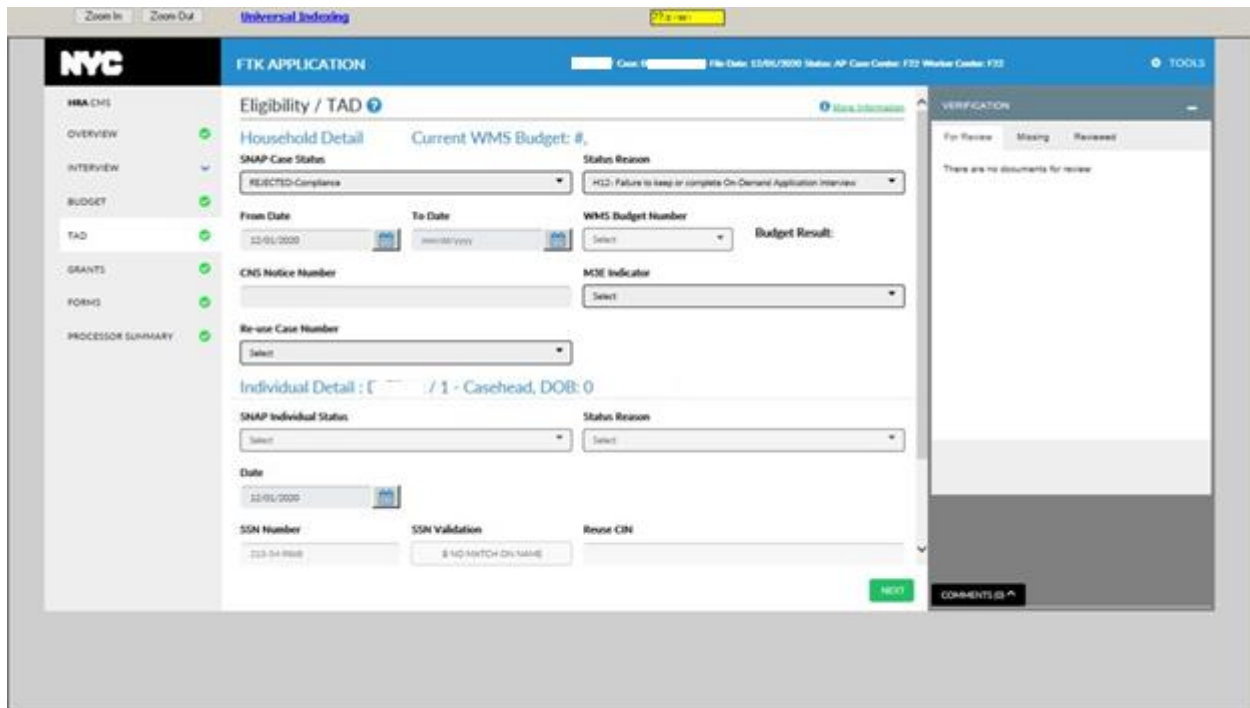
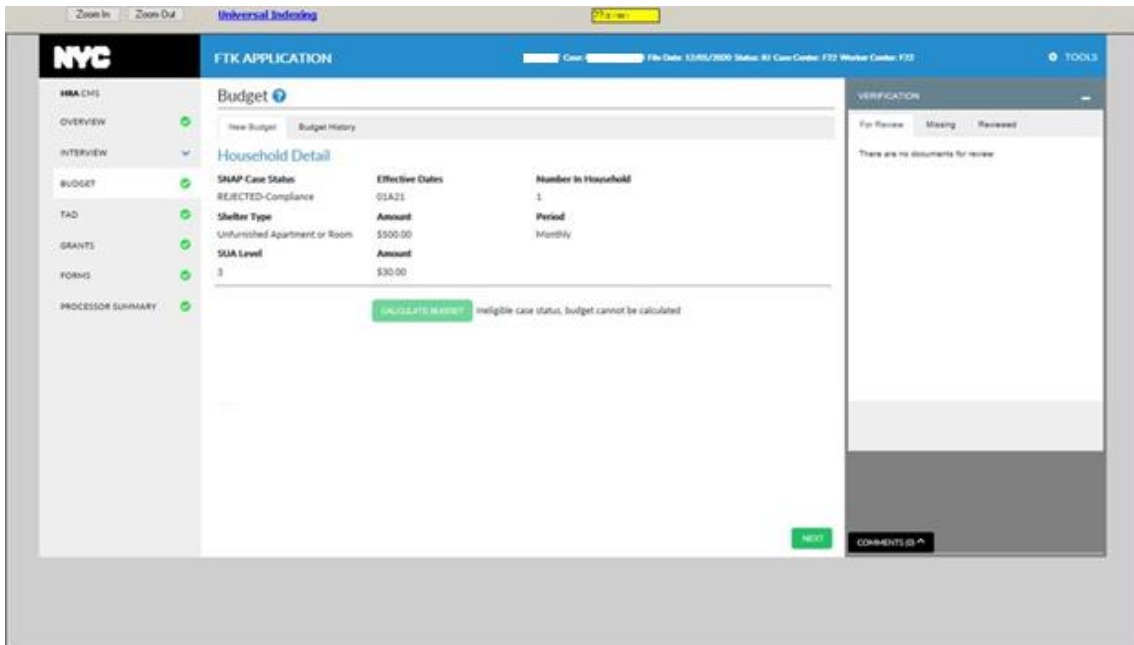
The screenshot displays the 'FTK APPLICATION' Overview page. The left sidebar contains a navigation menu with the following items: OVERVIEW (selected), INTERVIEW, BUDGET, TAD, GRANTS, FORMS, and PROCESSOR SUMMARY. The main content area is titled 'Overview' and includes sections for 'Case Composition', 'Other Applications Submitted', 'Case Alerts', and 'Reasonable Accommodations'. The 'Case Composition' section contains a table with the following data:

HH Member	CIN	DOB	SSN	SNAP Status	Reason	SNAP Status Date
1				AP		12/1/2020

The 'Other Applications Submitted' section shows a table with columns for Case Number, File Date, Application Status, and Date of Status. Below this, the 'Case Alerts' section displays a warning icon and the text 'No Matches Found'. The 'Reasonable Accommodations' section is currently empty. On the right side, there is a 'VERIFICATION' panel with tabs for 'For Review', 'Missing', and 'Revised'. Below these tabs, it states 'There are no documents for review'. At the bottom right of the main content area, there are 'NEXT' and 'COMMENTS (0)' buttons.

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Note: During the Covid-19 emergency, the Rejection Code **H12** cannot be used. Please select code **E10 (Failure to Complete Interview)** from the Status Reason dropdown.

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NYC FTK APPLICATION

File Date: 12/01/2020 Status: R1 Case Center: F22 Worker Center: F22

Eligibility / TAD

Household Detail Current WMS Budget: #.

SNAP Case Status: REJECTED-Compliance Status Reason: EID Failure to Keep/Complete Interview, No Schedule appointment

From Date: 12/01/2020 To Date: 12/01/2020 WMS Budget Number: Select Budget Result:

CMS Notice Number: MCE Indicator: Select

Re-use Case Number: Select

Individual Detail: 0 / 1 - Casehead, DOB: 0

SNAP Individual Status: Select Status Reason: Select

Date: 12/01/2020

SSN Number: SSN Validation: 8 NO SWITCH ON NAME Reason CUI:

NEXT

VERIFICATION: For Review, Missing, Reviewed. There are no documents for review.

COMMENTS (0)

NYC FTK APPLICATION

File Date: 12/01/2020 Status: R1 Case Center: F22 Worker Center: F22

Processor Summary

RFI Summary

RFI Member	RFI Type	Resolution
There is no RFI		

Activity Outcome - Case Acceptance - Budget

Case Decision: R Reason: EID Failure to Keep/Complete Interview, No Schedule appointment

SUBMIT

VERIFICATION: For Review, Missing, Reviewed. There are no documents for review.

COMMENTS (0)

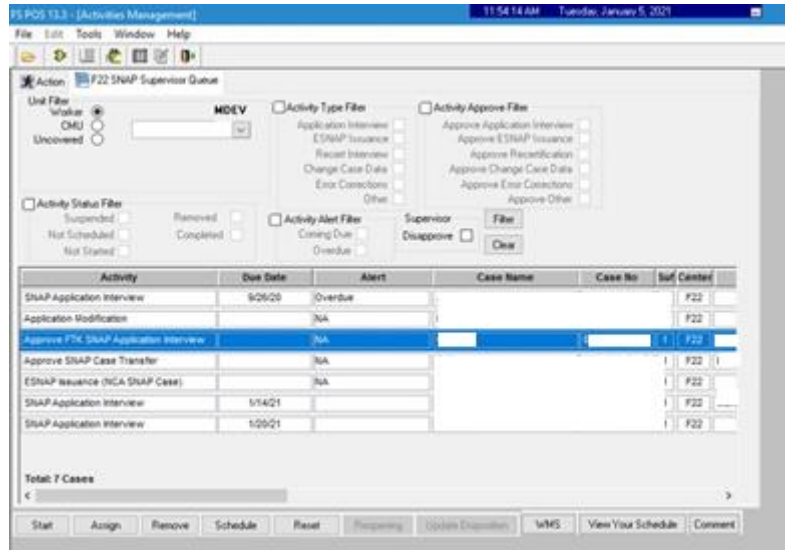
10. Approve Fail to Keep SNAP Application Interview and Approve Error Correction Fail to Keep Interview Actions

To begin an **Approve FTK-SNAP Application Interview** or **Approve EC-FTK SNAP Application Interview** activity on a case, a Supervisor would access the action from their queue.

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- Click on the activity and press **Start** to begin.



The **Approve Fail to Keep SNAP Application Interview** and **Approve Error Correction Fail to Keep SNAP Application Interview** actions are added for the Supervisor to process cases that failed to keep the interview. **Approve Fail to Keep** and **Approve Error Correction Fail to Keep** activities are available in the following complete standard approval flow: **Overview, Interview Review, Budget, TAD, Grants, Forms** and **Supervisor Summary**.

- Click on the **Checkmark** icon to approve the section as in other approval actions..
- Click the **X icon** if disapproving, and a popup window opens where the Supervisor can select one or more disapproval reasons and also enter a comment. Continue to approve/disapprove all the remaining sections on the **Interview Review** screen.
- Click **Next** and the Supervisor can return the case to the Worker if the case is being disapproved on the **Supervisor Summary**.
- The Supervisor can approve the **Fail to Keep** activity by approving all sections on **Interview Review** by clicking **Complete** on the **Supervisor Summary**. The Fail to Keep will be transmitted to WMS.

Streamlined POS Release Notes

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NYC APPROVE FTK APPLICATION

File Date: 12/01/2020 Status: 81 Case Center: F22 Worker Center: F22

Interview Review

Household Details

Contact Information

Residential Address Mailing Address

Visually Impaired: No

Member Detail: /1 Casehead, Male, DOB:

Household

Social Security Status: B No match on name Social Security Number: E Ethnicity: Hispanic/Latino, American Indian/ Alaska Native, Asian, Black or African American, Native Hawaiian/ Pacific Islander, White

Individual Details

CIN: Marital Status: Single/never Married Born in NYC? Yes US Citizen/National: Yes

Highest Degree Obtained: No Degree US Military Veteran? No, Not Veteran Language Spoken: English

VERIFICATION: For Review Missing Reviewed

There are no documents for review

NEXT COMMENTS

NYC APPROVE FTK APPLICATION

File Date: 12/01/2020 Status: 81 Case Center: F22 Worker Center: F22

Budget

Household Detail

SNAP Case Status	Effective Dates	Number in Household
REJECTED-Compliance	00A21	
Shelter Type	Amount	Period
SLA Level	Amount	
3	\$30.00	

INELIGIBLE STATUS: Ineligible case status, budget cannot be calculated

VERIFICATION: For Review Missing Reviewed

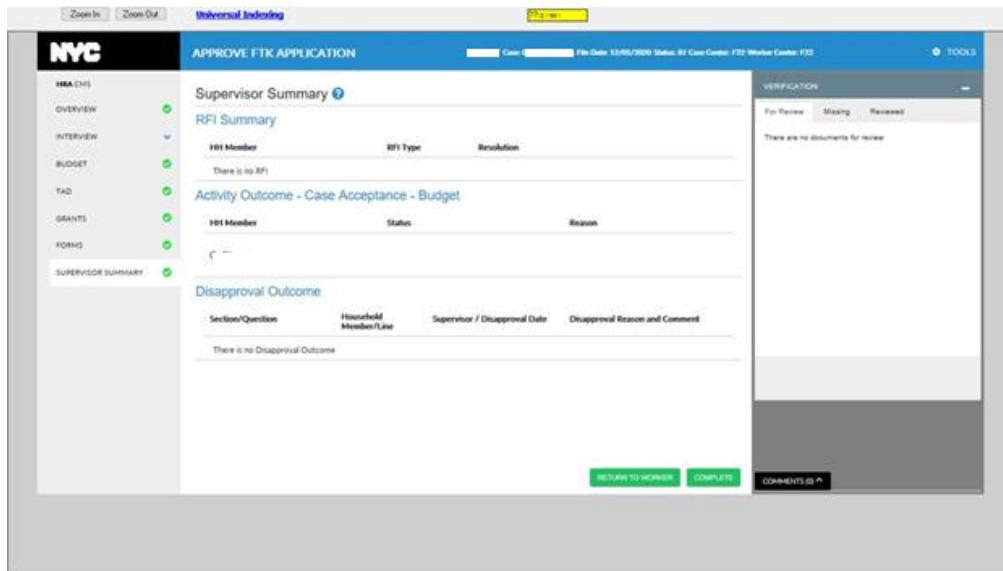
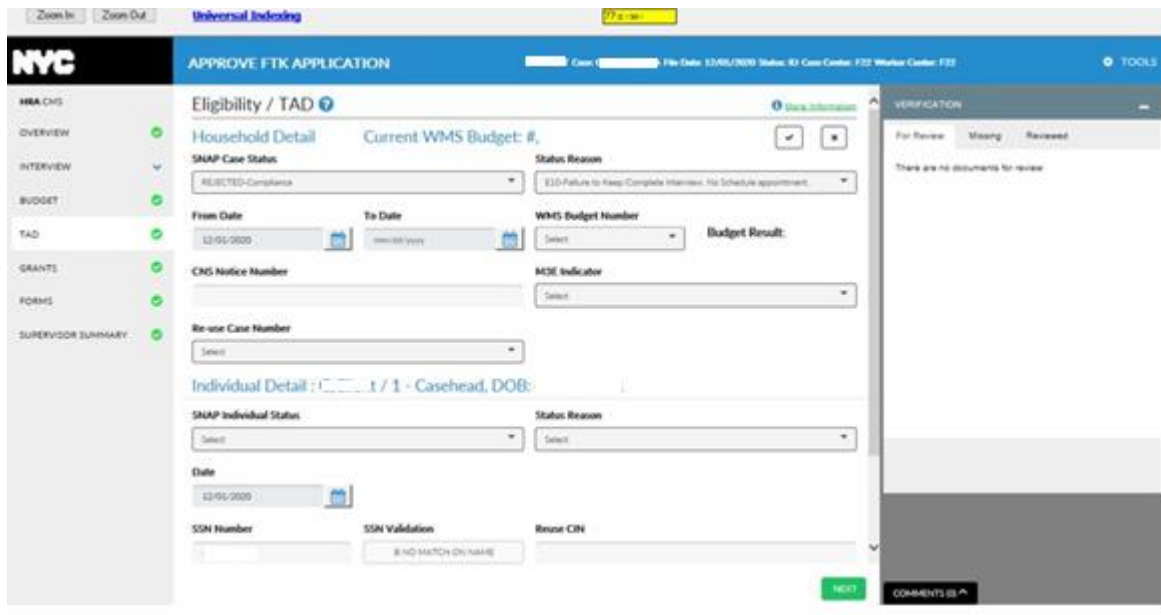
There are no documents for review

NEXT COMMENTS

Note: During the Covid-19 emergency, the Rejection Code **H12** cannot be used. Please check that **E10** is entered in the **Status Reason** dropdown.

Streamlined POS Release Notes

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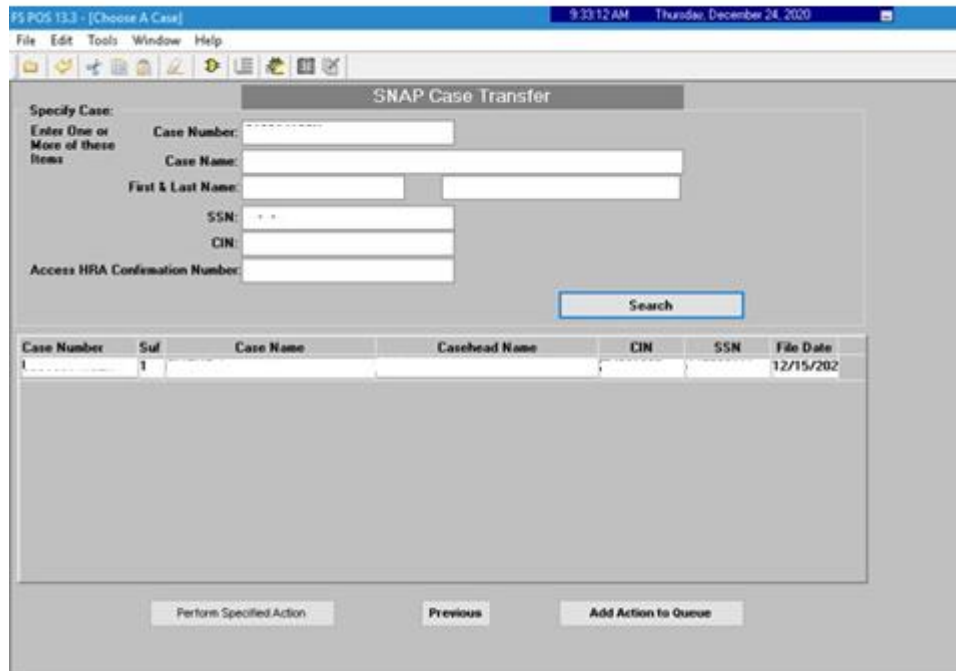
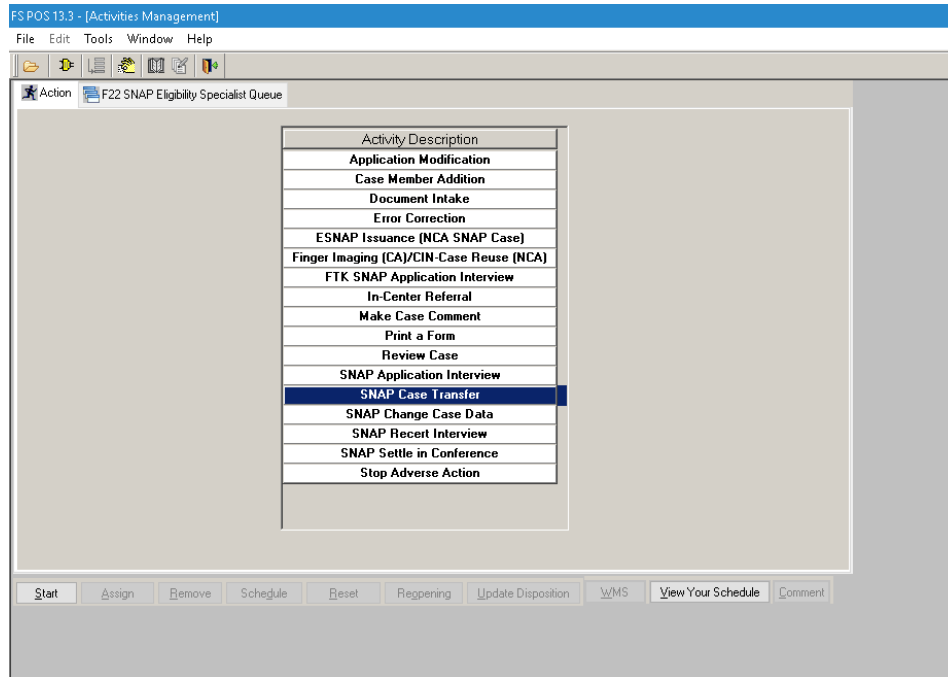


11. SNAP Case Transfer

- Select **SNAP Case Transfer** from the **Classic POS Action Menu** and click on the **Start** button to begin a **SNAP Case Transfer** activity on an active case... All other actions must be completed on the case in order to access the **Case Transfer** activity.
- Type the desired case number and click the **Search** button on the **Choose a Case** window..
- Select the case from the results displayed, then click on the **Perform Specified Action** button, which will launch the **Case Transfer** activity in Streamline POS.

Streamlined POS Release Notes

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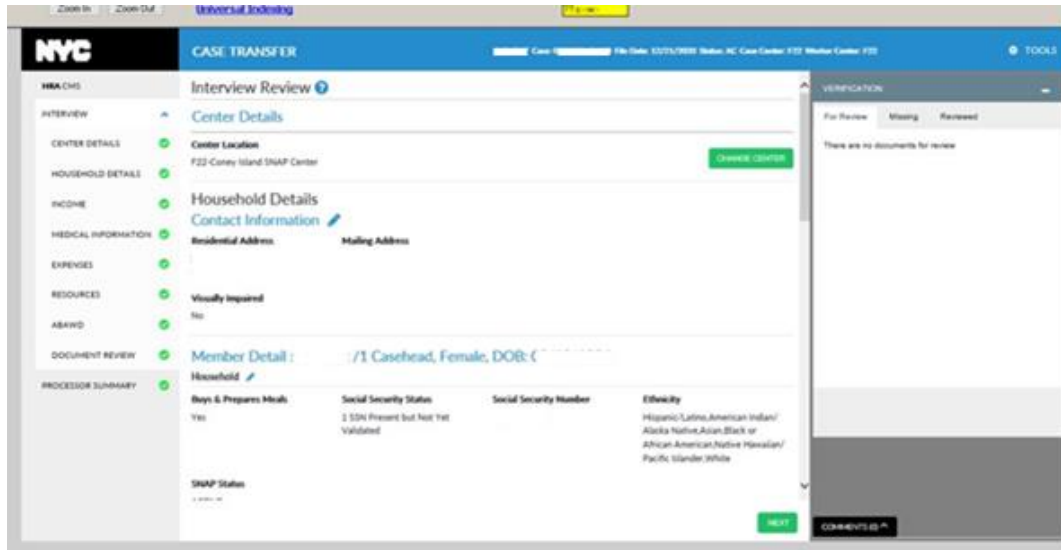


The **SNAP Case Transfer** activity launches in Streamlined POS. There is a new **Center Details** section in the **Interview Review** screen which shows the current center the case belongs to.

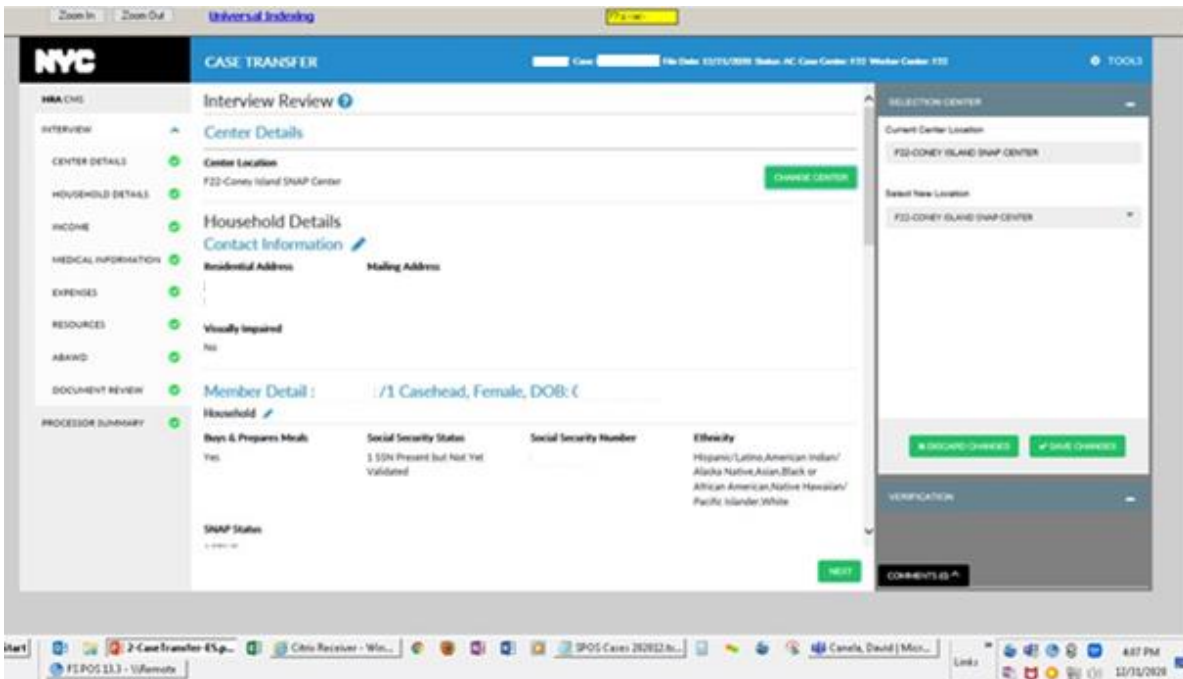
Streamlined POS Release Notes

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- The Worker selects the desired center to send the case to by clicking the **Change Center** button and a side panel **Selection Center** opens.
- The Worker selects **New Center Location** from the dropdown, and clicks **Save Changes** to save the desired center to transfer the case. Workers then submit the case to their Supervisor for approval.



- The Worker clicks the **Change Center** button and the side panel opens where the new center location can be chosen from the **New Center Location** dropdown.

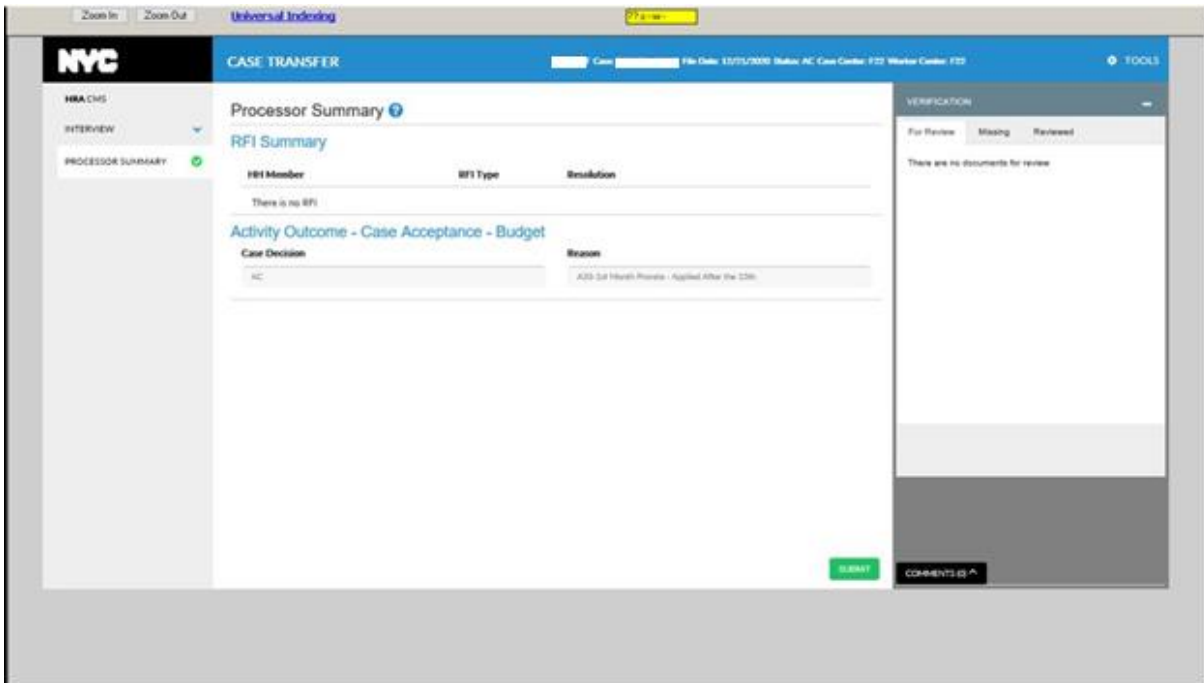


- The Worker selects the new center and clicks on **Save Changes**.

Streamlined POS Release Notes

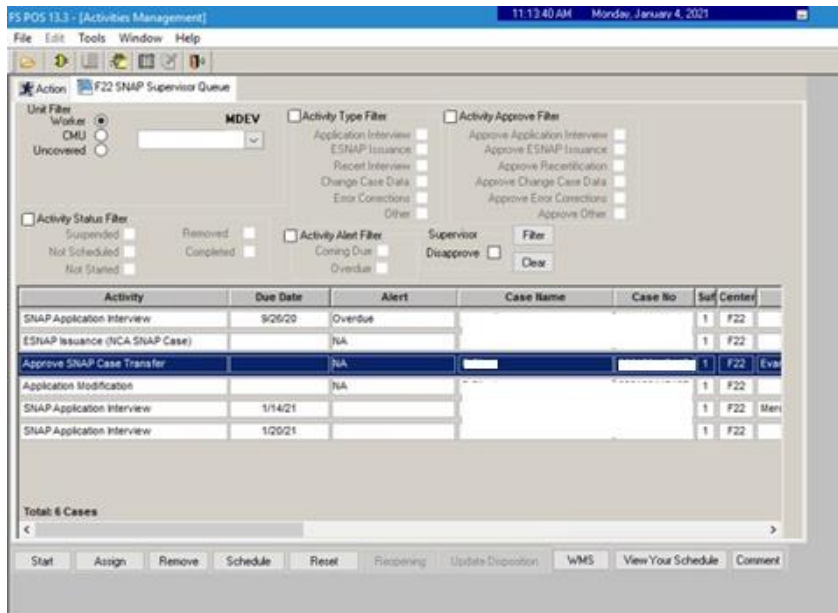
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- Click **Next** to continue. On the **Processor Summary** click **Submit** to send the case transfer to the Supervisor for approval.



12. Approve SNAP Case Transfer

- A Supervisor should access the action from their queue to begin an **Approve SNAP Case Transfer** activity on a case.
- Click on the activity and press **Start** to begin.



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Approve SNAP Case Transfer activity launches in Streamlined POS. There is a new **Center Details** section in the **Interview Review** screen where the current center and data is displayed. The Supervisor cannot change this information. The Supervisor can approve or disapprove **Center Details** as follows:

- Click the **Checkmark** icon to approve the **Center Details** section.
- Click the **X icon** to disapprove, and a **Disapprove Center Details** popup window opens where the Supervisor can select one or more reasons and also enter a comment.
- Continue to approve/disapprove all the remaining sections on the **Interview Review** screen.
- Click **Next** to return the case to the Worker if the case transfer is being disapproved on the **Supervisor Summary**.
- Click **Complete** on the **Supervisor Summary** to approve the transfer of a participant's case by approving all sections on **Interview Review**.

The change in center will be transmitted to WMS.

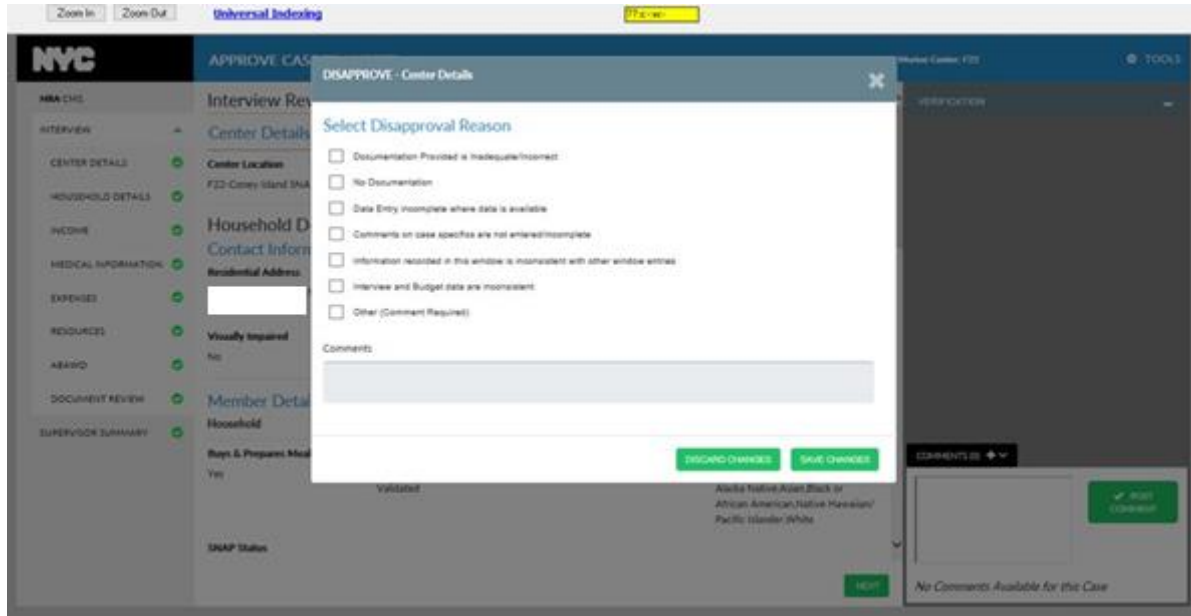
Example of **Interview Review** screen with new **Center Details** section.

The screenshot displays the 'Interview Review' screen in the Streamlined POS system. The interface includes a sidebar on the left with a navigation menu containing sections like INTERVIEW, CENTER DETAILS, HOUSEHOLD DETAILS, INCOME, MEDICAL INFORMATION, EXPENSES, RESOURCES, ABAWD, DOCUMENT REVIEW, and SUPERVISOR SUMMARY. The main content area is titled 'Interview Review' and features several sections, each with a checkmark icon and a dropdown menu for approval actions. The 'Center Details' section is highlighted, showing 'Center Location' as 'F22-Coney Island SNAP Center'. Below it are 'Household Details' and 'Contact Information' with fields for 'Residential Address' and 'Mailing Address'. The 'Member Detail' section shows '/1 Casehead, Female, DOB'. At the bottom, there are fields for 'Boys & Prepares Meals', 'Social Security Status', 'Social Security Number', and 'Ethnicity'. A 'NEXT' button is visible at the bottom right of the main content area. On the far right, a 'VERIFICATION' panel is partially visible, showing tabs for 'For Review', 'Missing', and 'Reviewed', with a message 'There are no documents for review'.

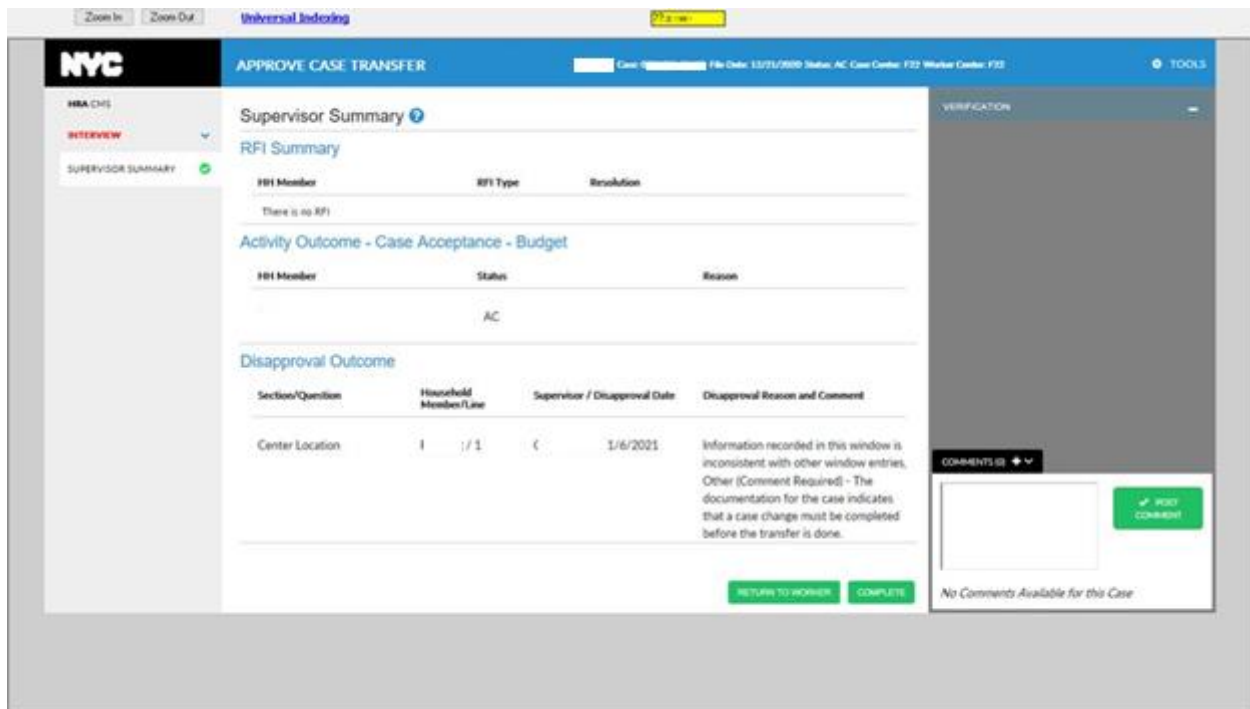
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Example of Disapproving Center Details popup.



Example of Supervisor Summary showing disapproval, therefore the case needs to be returned to the Worker.



If the case transfer is approved, and **Complete** has been clicked, the system initiates transmission to WMS of the change in center.

Streamlined POS Release Notes

Version 4.1, Spring 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.1 for Monday, March 29, 2021. 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. Overview of Changes

The Streamlined POS (SPOS) project aims to modernize and improve the interview, change actions and processing for the users of the Paperless Office System (POS) in the Supplemental Nutrition Assistance Program (SNAP) area of FIA (Family Independence Administration), including interviewers, processors, supervisors, and reviewers.

The following changes were introduced in Release 4.1:

- Overview screen updates.
- There are increased capabilities on the Verification Widget, additions to the Tools menu, displaying the Client Identification Number (**CIN**) **Clearance/CIN Re-Use** window.
- The **Interview Review** screen has been updated to include help text for all the sections, the ability to display warnings/error messages, addition of more data fields on the **Interview Review** screen.
- The **Budget** screen has been updated to have help text, the summation of multiple incomes of the same income source types into one row in the budget, additional warning for adding new members to the household. The **Calculate Budget** function has been improved to a new technology platform so that the black Welfare Management System (WMS) screens no longer appear.
- The Turnaround Document (TAD) screen updates include additional warning messages and additional business rules for use of **M73** (Continue Employment Requirement Sanction [HH = 1]) and **M74** (Continue Employment Requirement Sanction [HH > 1]) and valid closing/rejection codes.
- The **Grants** screen has been updated with Help text and business rules to prevent entry of duplicate grants and a check whether backup grants are needed.
- The Forms screen has been updated with Help text and additional forms such as the Notice of Special Cash Assistance and/or Food Stamp Benefit (**EBT-23**), Action Taken On Your Supplemental Nutrition Assistance Program (SNAP) Benefits Case (NYC) (**LDSS-3152**), Request For Contact/Missed Interview (**LDSS-4753**), Notification of Application Withdrawal Cash Assistance, Food Stamps and Medical Assistance (**M-3mm**), and the History Sheet (**FIA-1236**).
- The **Processor Summary** has been updated to include help text, additional completion edits and the capability for Workers to submit the case to the Supervisor in SPOS.
- The **Supervisor Summary** has been updated to include help text, and the capability for Supervisors to transmit cases to Welfare Management System (WMS) or return the case to worker, in SPOS.
- Business rules and case attributes have been developed so that the **Selective Case Review** process is enabled in Streamlined POS.
- In Streamlined POS 4.1 technology updates in the application enables moving away from dependence on legacy Citrix/PowerBuilder technology and moving towards a web-based application.

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2. Overview Screen changes

The **Overview** screen was updated for Processors and Supervisors to add the **Verification Widget**, add the **Comments Widget**, remove duplicate information and add **Reasonable Accommodation**.

Reasonable Accommodations: All required **Reasonable Accommodation** fields displayed on the **Overview** screen to comply with lawsuit requirements. If there are no reasonable accommodations, it will not be listed. The **Client Services** screen has been removed from Streamline POS.

Following fields display on the **Overview** Screen:

- **HH Member**
- **RA Name**
- **RA Effective Date**
- **RA Message**
- **Employability Status**
- **SSI Status**

The **Overview** screen has been adjusted so that right-side panel is available to display comments and any other widgets.

The screenshot displays the NYC SNAP Application Interview Overview screen. The left sidebar shows navigation options: OVERVIEW (selected), INTERVIEW, BUDGET, TAD, GRANTS, FORMS, and PROCESSOR SUMMARY. The main content area is titled 'Reasonable Accommodations' and contains a table with the following columns: HH Member, RA Name, RA Effective Date, RA Message, and Employment SSI Status. The table lists several accommodations, such as 'Help for people who are deaf or hard of hearing' and 'No appointments during rush hour'. A 'NEXT' button is visible at the bottom right of the table. On the right side, there is a 'VERIFICATION' widget with tabs for 'For Review', 'Missing', 'Other Docs', and 'Reviewed'. Below the tabs, it states 'There are no documents for review'. At the bottom right of the screen, there is a 'COMMENTS' widget.

HH Member	RA Name	RA Effective Date	RA Message	Employability Status	SSI Status
	Help for people who are deaf or hard of hearing	8/25/2020	If you are seeing this client in person, you may need to use written communication modes, such as writing notes. If the client is on phone, you may need to use relay service technology, text messaging, email or text letters.	SS - Person 10 years of age or older Exempt	
	No appointments during rush hour	8/25/2020	Please schedule all appointments weekdays between the hours of 11:00am until 2:00pm. Fri 8:00 am - 10:59 am	SS - Person 10 years of age or older Exempt	
	Help Completing Forms	8/25/2020	Please be prepared to assist the client to complete the forms. If the client is on phone please encourage the client to come into the MHA center if possible.	SS - Person 10 years of age or older Exempt	
	No Appointments during certain days and times	8/25/2020	Please schedule all appointment at the client's available dates and times. Fri 11:00 am - 1:59 pm Fri 8:00 am - 10:59 am	SS - Person 10 years of age or older Exempt	
	Shorter Wait Times	8/25/2020	The client's wait time must be minimized.	SS - Person 10 years of age or older Exempt	
	Making Appointments when you can have someone come with you.	8/25/2020	Please schedule the client's appointment when their travel companion is also available. Fri 8:00 am - 10:59 am	SS - Person 10 years of age or older Exempt	
			Please examine the		

A new case alert was added on the **Overview** screen when the Standard Utility Allowance (SUA) level changed on a case.

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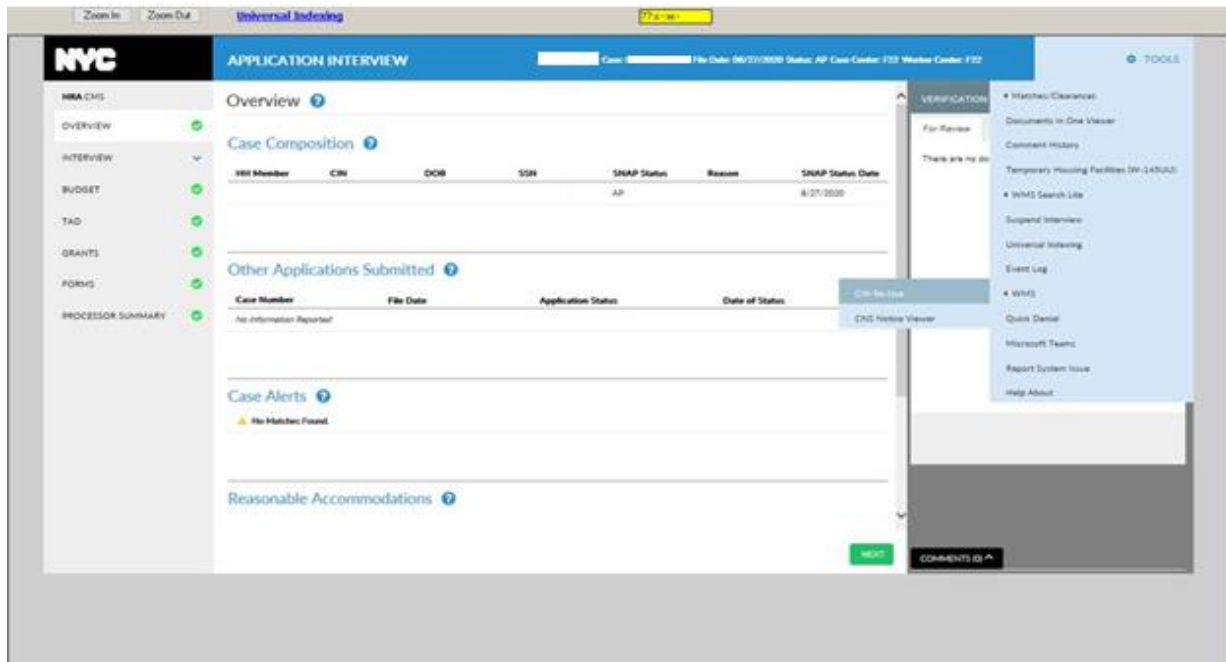
	Case Number	File Date
OVERVIEW ✔	<i>No Information Reported</i>	
INTERVIEW ▼		
BUDGET ✔		
TAD ✔		
GRANTS ✔		
FORMS ✔		

Case Alerts ?

- ▲ No Matches Found.
- ▲ SUA level change indicated during interview.

3. Display Internal Clearance and CIN Reuse data

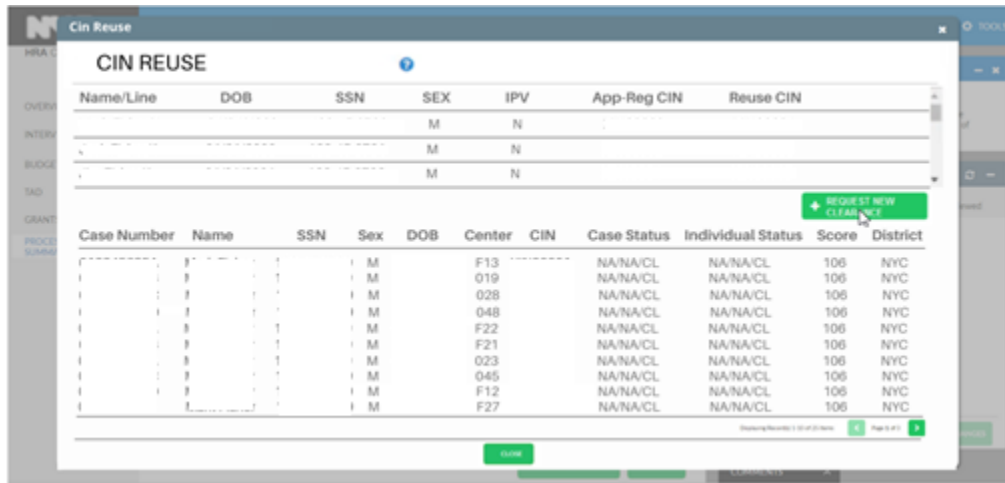
The **CIN Reuse** window has been added for Processors to request a new clearance if the internal clearance failed in WMS. For processors, a new option is available under **Tools > WMS > CIN Re-Use**



The Worker can see the **Internal Clearance/CIN Reuse** for each individual household member that appears in WMS in Applying (AP) status for SNAP. The Worker can also verify the system selection for the individual CIN or request a new clearance if the internal clearance failed in WMS.

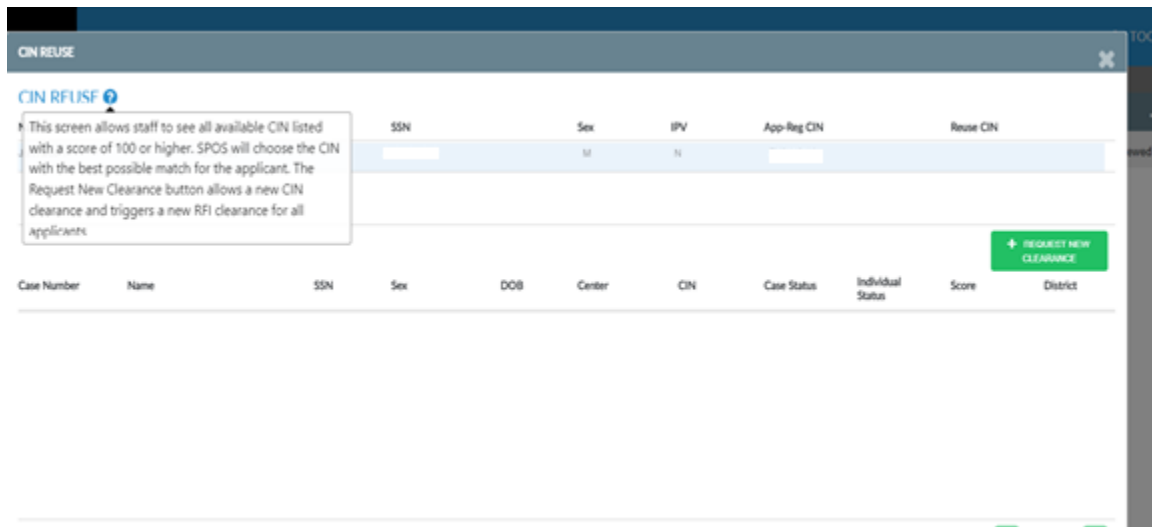
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- The Worker must click the blue **Question Mark** icon to see the **Help** text at the top of the **CIN Reuse** window to get assistance in using the screen.

Help text displays as follows: "This screen allows staff to see all available CIN's listed with a score of 100 or higher. SPOS will choose the CIN with the best possible match for the applicant. The **Request New Clearance** button allows a new CIN clearance and triggers a new Resource File Integration (RFI) clearance for all applicants."



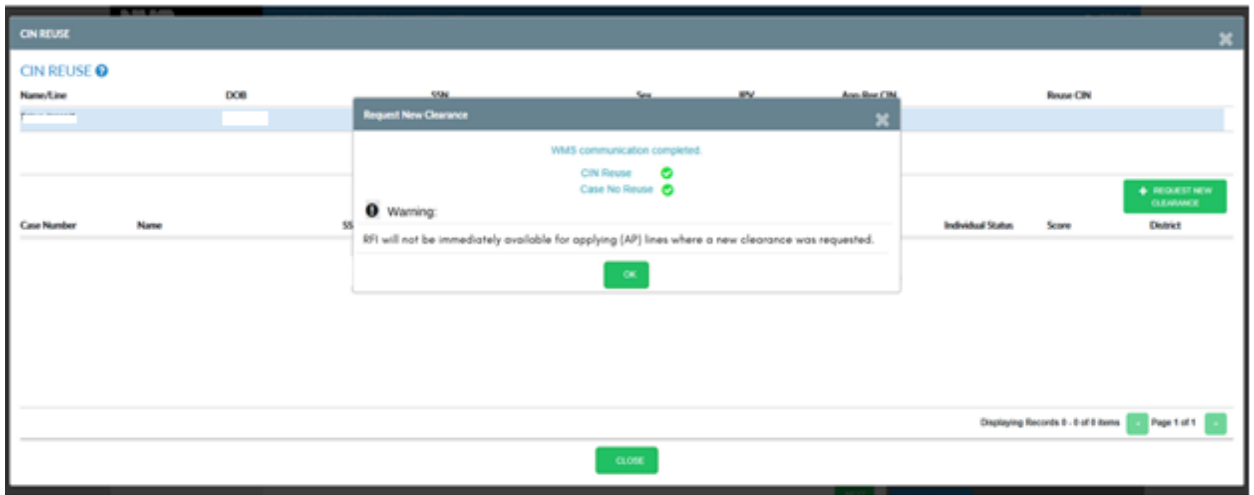
The Worker can see the alert stating a new RFI clearance was initiated after requesting a new CIN/Internal clearance for AP household members on a SNAP case to remind the Worker that the RFI will not be immediately available for those lines.

- Click the **Request New Clearance** button on the **Internal/CIN Clearance** screen to view the Reminder.

The text of the warning message is as follows: "RFI will not be immediately available for AP lines where a new clearance was requested".

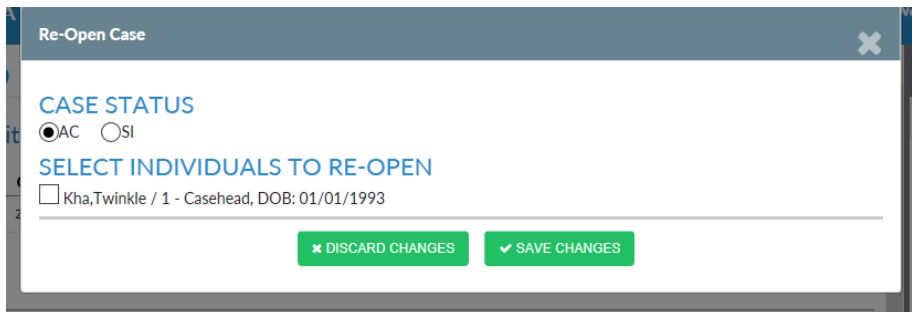
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4. Overview: Ability to Re-Open Closed Cases

- The Worker can click the **Re-Open Case** button in the **Overview** Screen to view individual level indicators for cases that are in Closed (CL) status in WMS. This opens the **Re-Open Case** pop-up window,
- The Worker clicks **AC** or Single Issue (**SI**) to select the individuals to re-open.



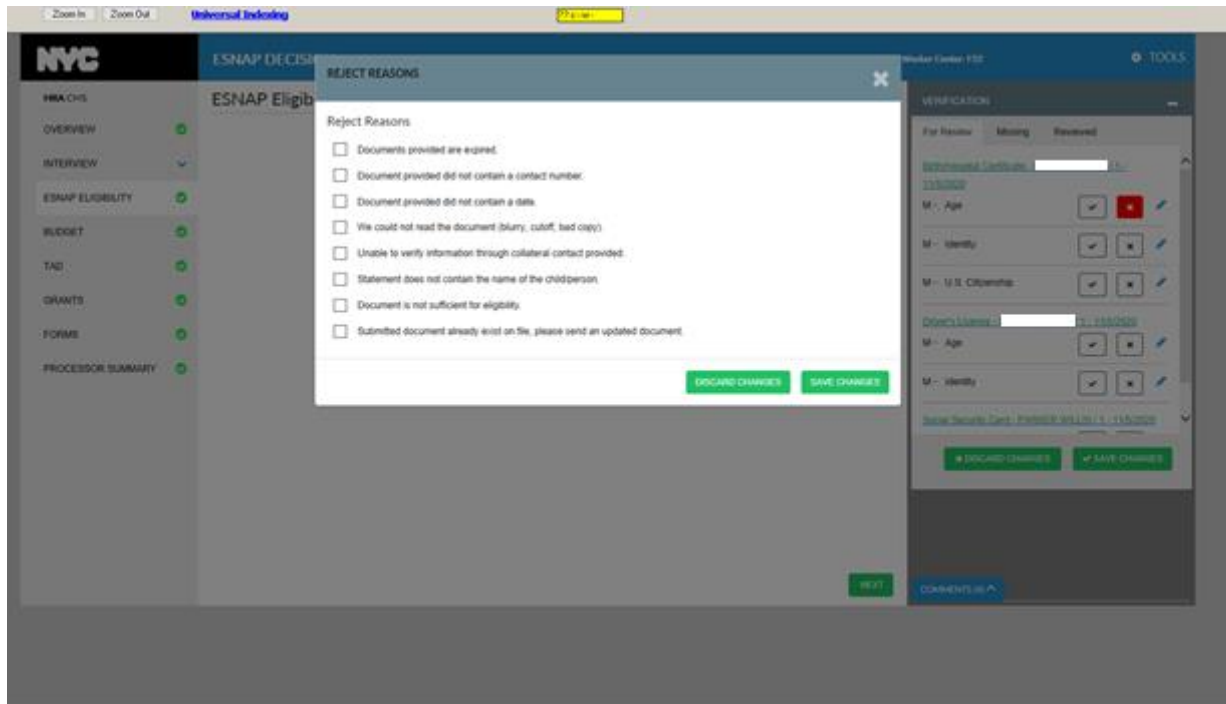
Streamlined POS Release Notes

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5. Verification Widget Updates

In SPOS 4, a new pop-up window with the reasons for the rejection of a document appear.

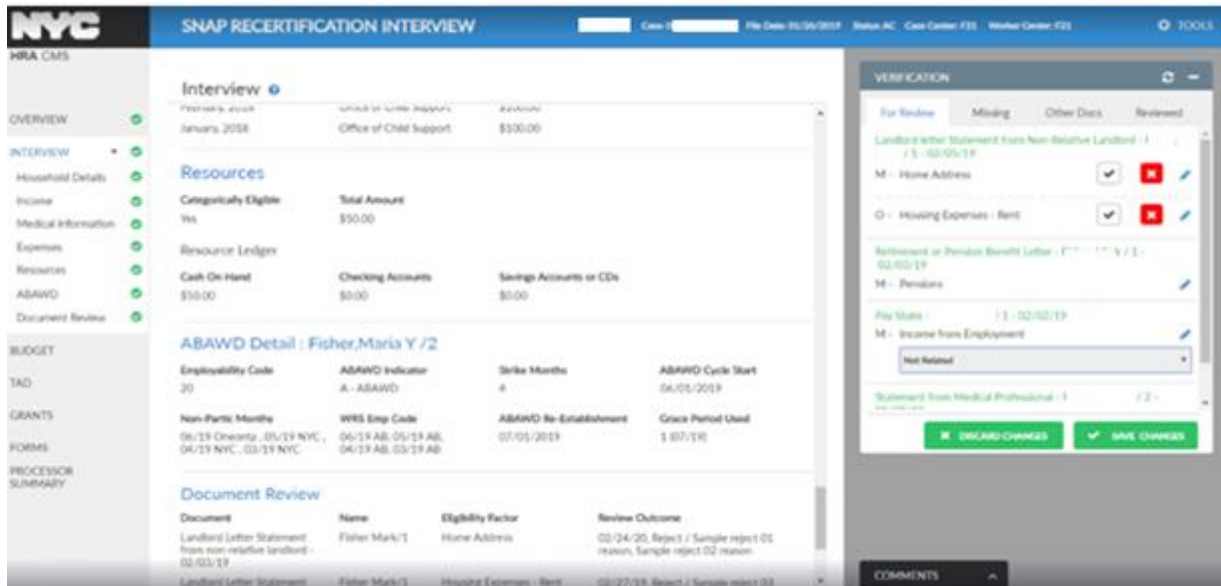
- The Worker must select one or more reasons for rejection.



The Worker can see the selections made in the documents in the **For Review** tab of the **Verification Widget** in a new section of the **Interview Review** screen named **'Document Review'**. The new **Document Review** section includes: **Document**, **Name**, **Eligibility Factor** and **Outcome**.

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The Worker can see recent application and recertification forms in the **Other Docs** tab of the **Verification** widget. The **Other Docs** tab is now hidden if there are no packets/other docs to be viewed.

6. Tools Menu: Addition of Quick Denial Function

The Worker has the ability to close or reject a case through a **Quick Denial** option in the **Tools** menu in order to quickly process a case that is fully ineligible prior to the complete full interview or processing action. **Quick Denial** opens a new modal window where the Worker can select an appropriate reason code to trigger a quick closing or rejection in the following actions for the processor roles: **SNAP Application Interview** and **SNAP Recertification Interview** when the case is in AP, SI, or Active (AC) status in WMS.

The **Quick Denial** function is available for Interviewers as well in the **SNAP Application Interview** and **SNAP Recertification Interview** when the case is in AP, SI, or AC status in WMS. If the case is in AP status in WMS, rejection reasons appear in the dropdown list. If the case is in SI or AC status in WMS, closing reasons appear in the dropdown list.

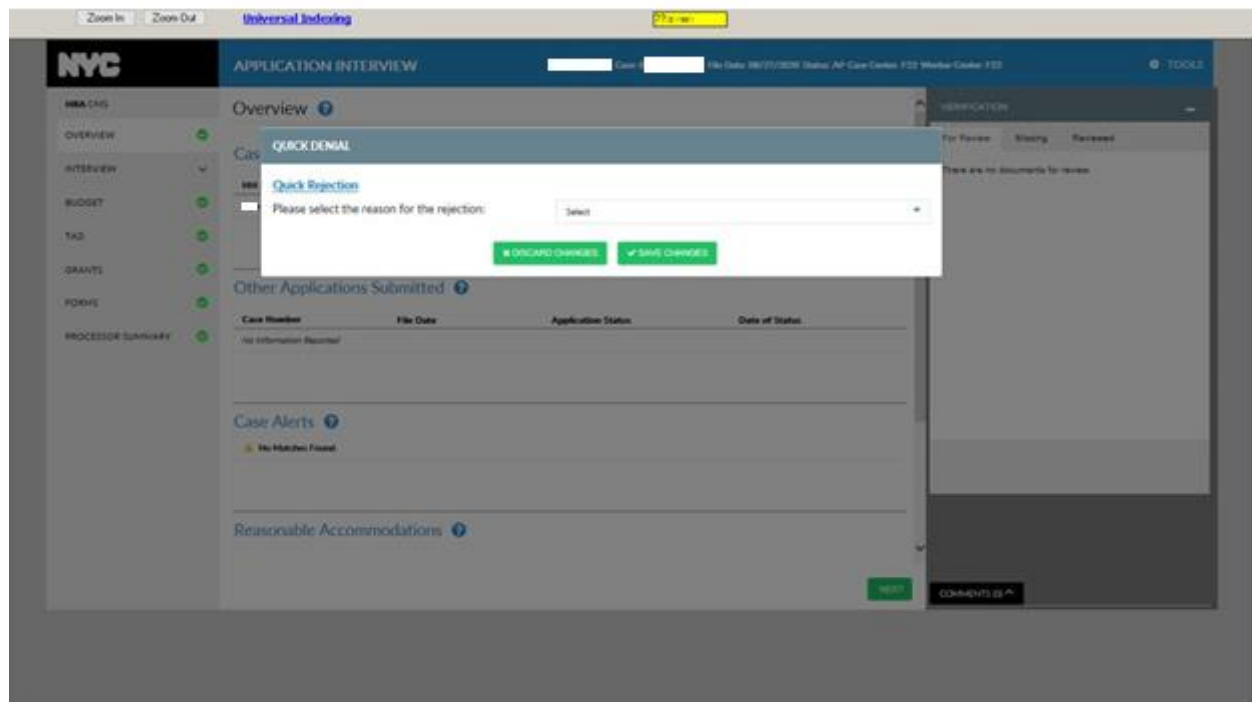
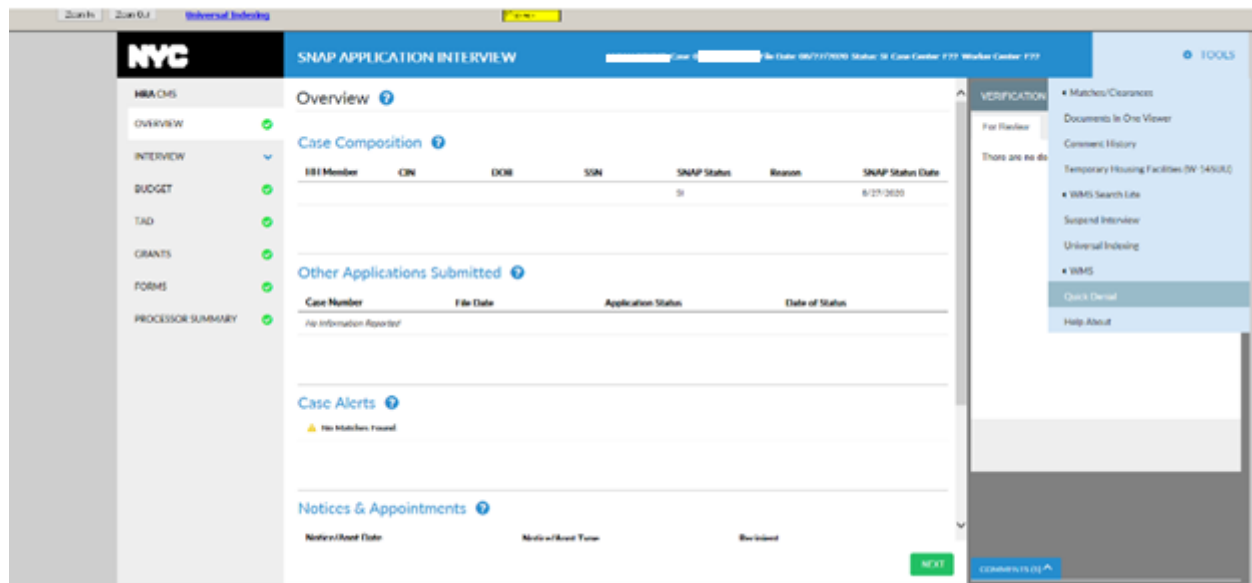
When the option **M66 (Receiving SNAP in Another Case)** or **M67 (Part of Another Application)** is selected in the **Denial Reason** field, an additional required question below the **Denial Reason** field appears with a drop-down menu with options of **Yes** and **No**: "Does this client have a health and safety reason for a new application or does this client need to establish their own household?"

- If the Worker selects **Yes**, a message: "**Ineligible for quick denial**" appears. The household must be interviewed and a full determination must be made. Click **Save Changes** to exit the window.
- If the Worker selects **No** and is within the Interviewer role, skip to the **TAD** screen, enable the full navigation bar and mark the appointment status (application for the **SNAP Application Interview** and recertification for the **SNAP Recertification Interview**) as retained. This will allow the Worker to complete the processing of the case.
- If the Worker selects **No** and is within the processor role, skip to the **TAD** screen.

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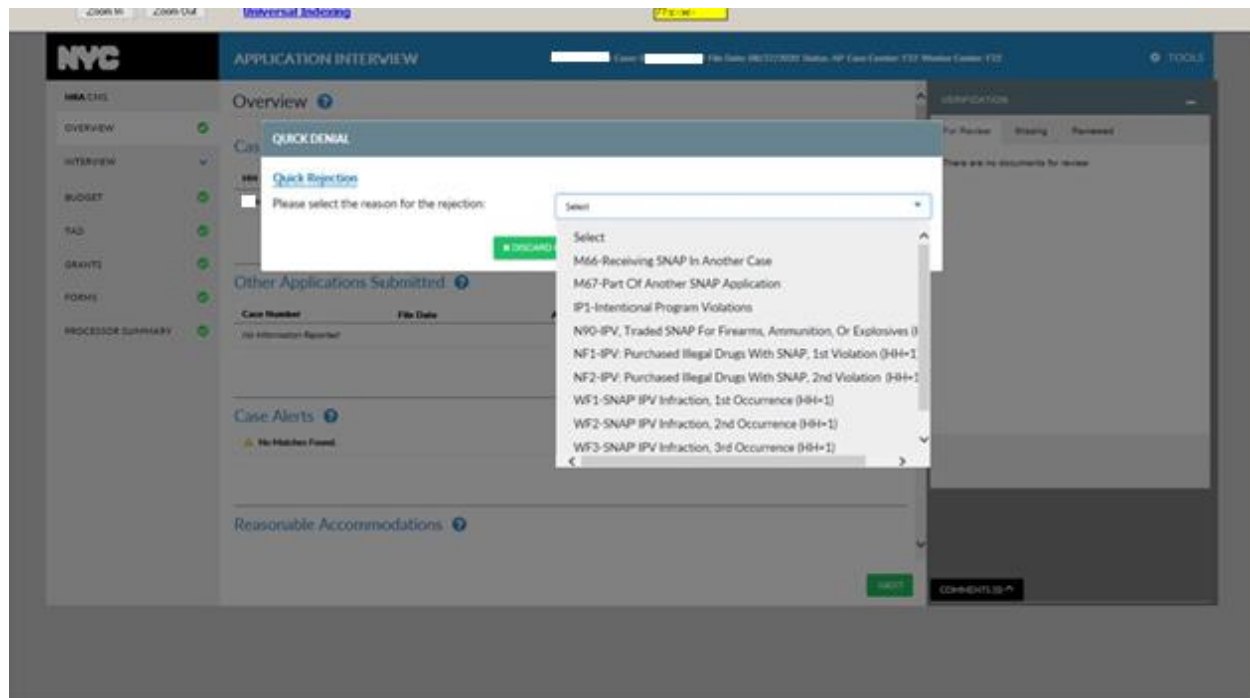
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- When the option Ineligible Alien [HH=1] (F92) is selected, the Worker clicks the **Save Changes** button and if there are any citizens on the case in AP, SI or AC status for SNAP or there are eligible non-citizens on the case in AP, SI or AC status for SNAP, the following error message is displayed: **“Invalid selection – Case contains eligible citizens or non-citizens.”**
- When **F92** is selected, the Worker clicks the **Save Changes** button and the Immigration section in SPOS is incomplete, the following error message is displayed: **“Invalid selection – Immigration section must be completed.”**



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7. Tools Menu: Additional Options

The **Tools** menu in Streamlined POS is updated to add the following links under Matches/Clearances:

- Disability Policy
- FIA Web Pages
- Kelley Blue Book
- NYC Department of Buildings
- POS Help on Intranet
- HRA eDocs link
- Special Assessment Policy

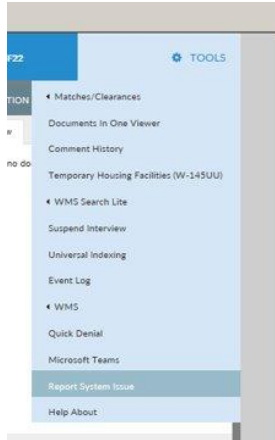


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The Worker can access additional web pages in the **Tools** menu that will help access communication tools and to report any system issues. Two new links have been added: **Microsoft Teams** and **Report System Issue**.

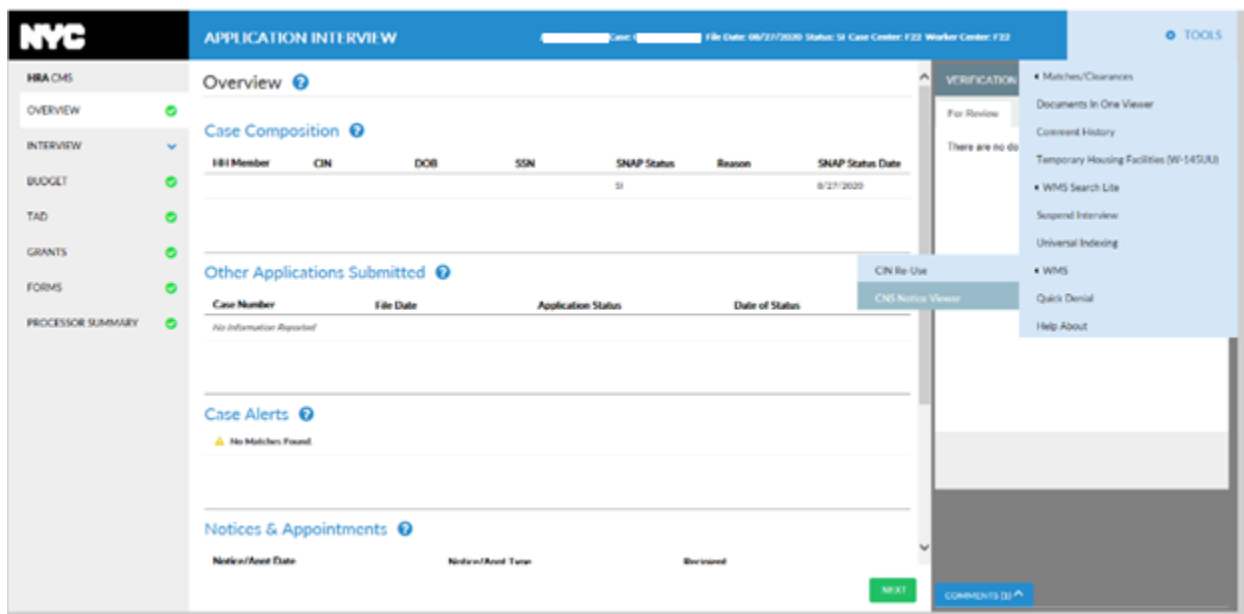
- Clicking the **Microsoft Teams** link on the **Tools** menu will open up a **Microsoft Teams** page.
- Clicking the **Report system issue** will open the **Self-Service Incident Form**.



8. Client Notice System (CNS) Notice Viewer

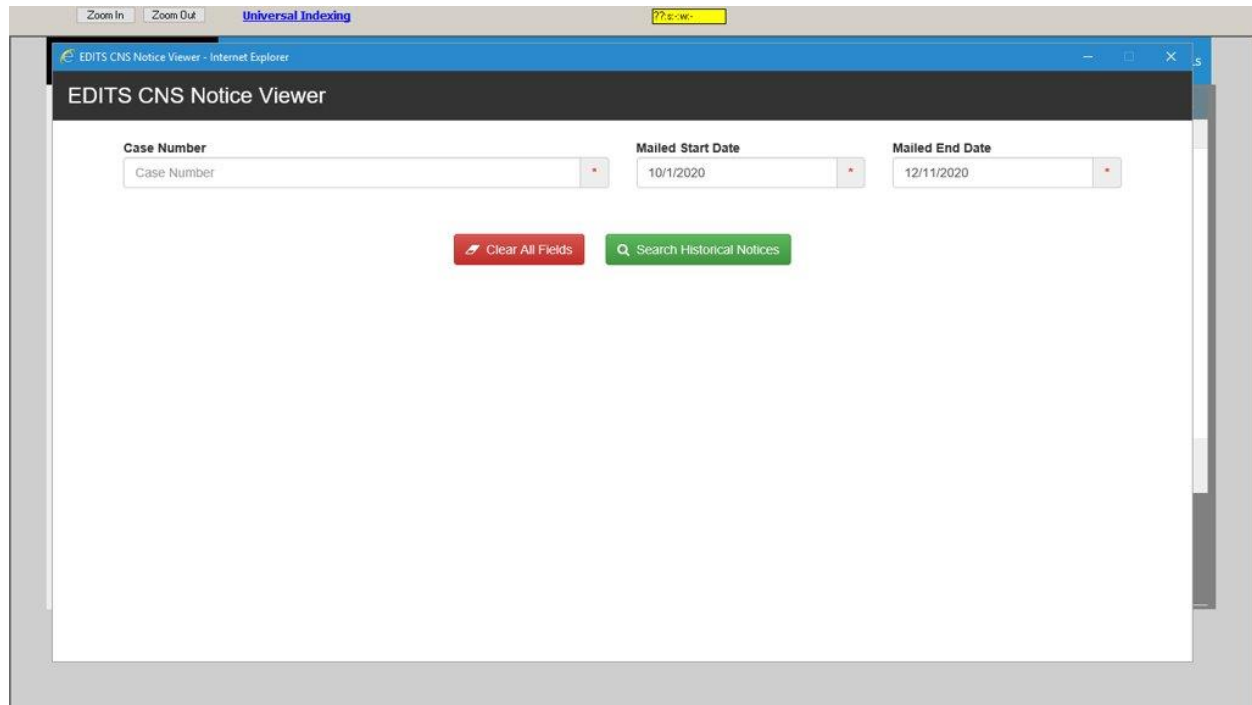
The Worker or Supervisor can access the **CNS Notice Viewer** to review State-generated notices without needing to access a separate website outside of the Human Resources Administration (HRA) network. The web-based **CNS Notice Viewer** is available for selection under the **Tools > WMS** menu in SPOS.

- The Worker or Supervisor must type in the case number to retrieve and view the notice.



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9. Suspend Update: Suspend Reasons Dialog Box

A **Suspend Reasons** dialog box has been added to SPOS when the Worker or Supervisor suspends a case. The Worker or Supervisor will be able to select from a list of reasons when suspending a case to document the reason for suspending a case. The dialog box has the following text and options: "Will you continue processing of this action within the next 2 hours? [Yes or No]."

If the Worker or Supervisor indicates that they intend to continue processing the action in the next two hours, the **Hold Reasons list** will be displayed. The **Hold Reasons** are listed below - only one reason can be selected:

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

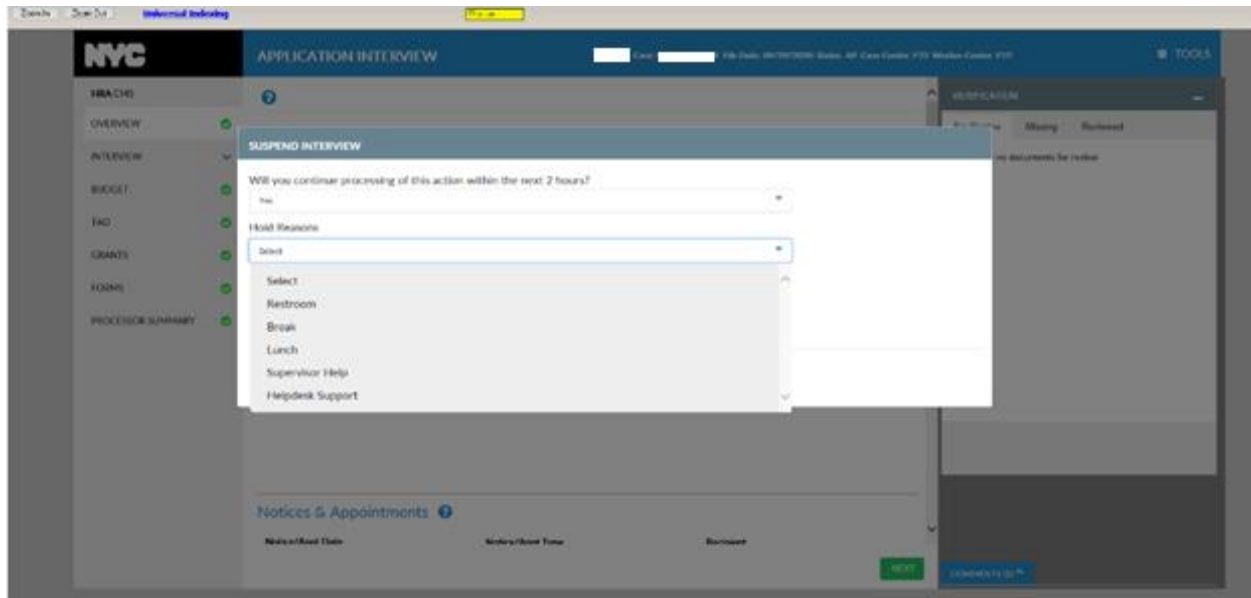
If the Worker or Supervisor indicates that they do not intend to continue processing the action within two hours, then display the return reasons. The return reasons are listed below - only one reason can be selected:

- End of Shift
- Leaving Sick
- Weather Emergency
- Leaving Personal (Planned)
- Leaving Personal (Unplanned)
- Conflict of Interest
- IVS/RFI Review Completed (*this reason is conditional*)
- Case Processed in PAM

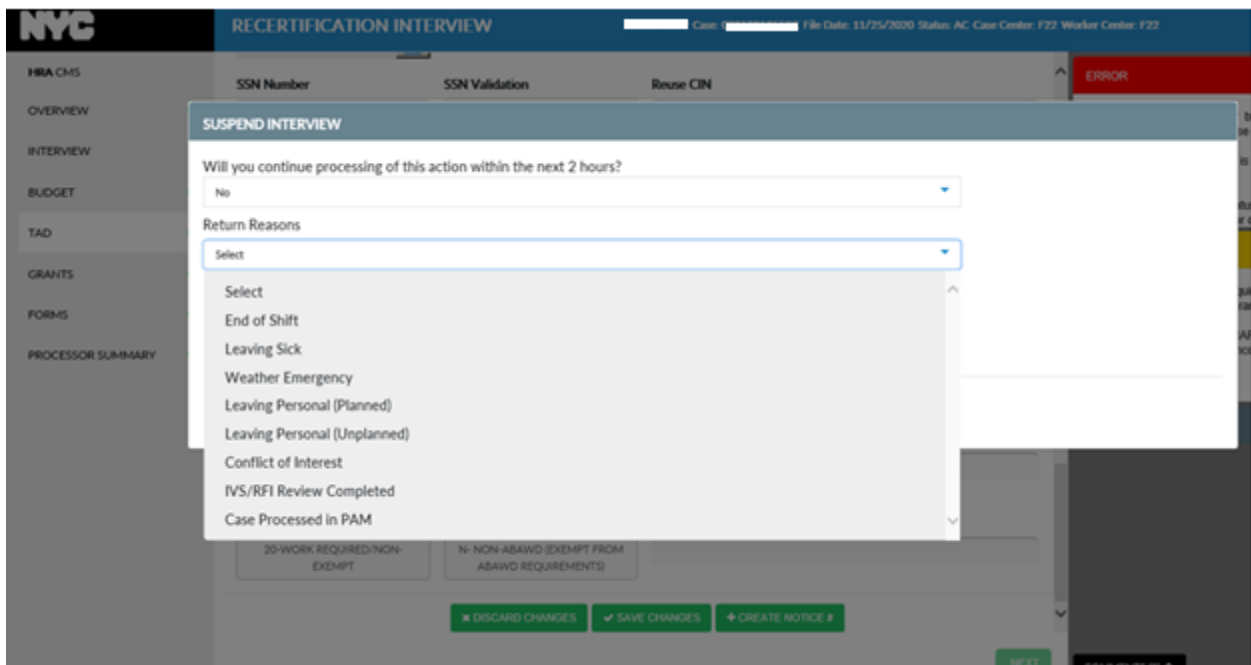
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Hold Reasons



Return Reasons

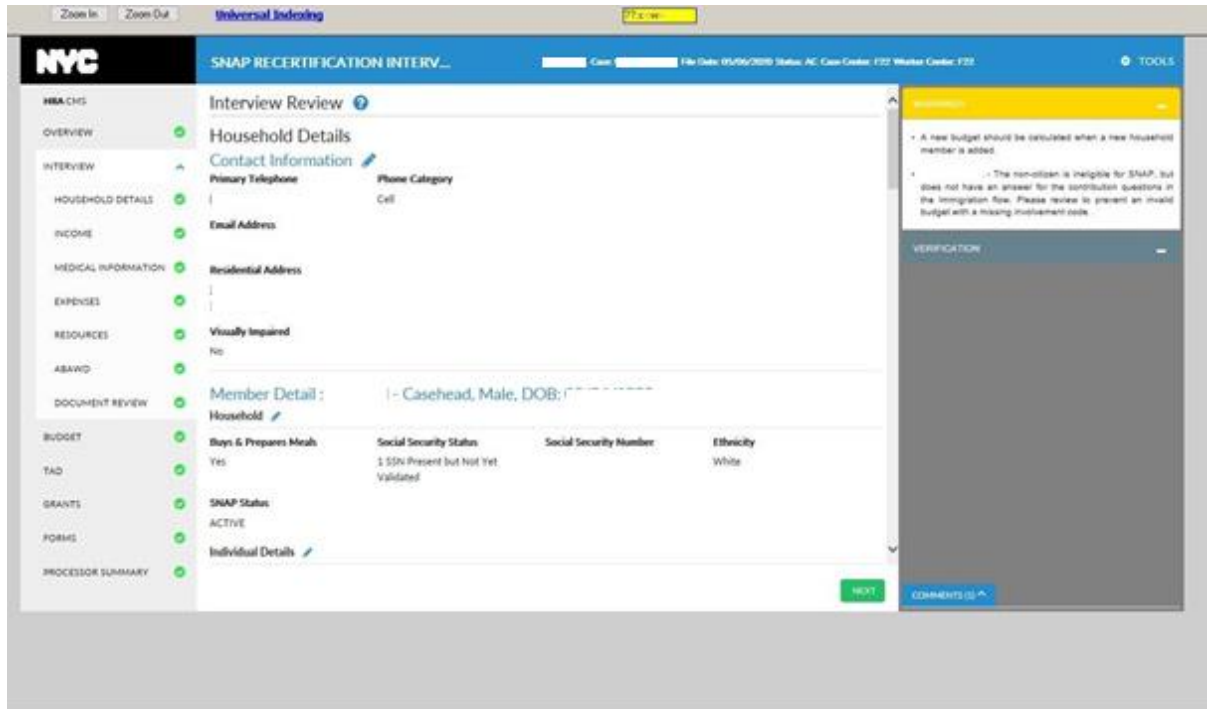


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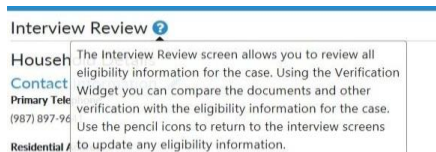
10. Interview Review: Warning Messages

The Worker or Supervisor can see the warning messages on the **Interview Review** screen in the processing and approval activities and the Worker or Supervisor can directly take action without needing to navigate backwards.



11. Interview Review: Help Text

- The Processor must click the **Help** icon on the top of the **Interview Review** screen to see the help text to get assistance in using the screen. Help text displays as follows: "The Interview Review screen allows you to review all eligibility information for the case. Using the Verification Widget, you can compare the documents and other verification with the eligibility information for the case. Use the pencil icons to return to the interview screens to update any eligibility information."



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12. Interview Review: Help Text for each Section

- The Worker or Supervisor will be able to see the Help Text for each section within the **Interview Review** screen by clicking on the blue **Question Mark** icon. Help text is displayed as tooltip per table below

Section	Help Text
Alerts	This section looks for certain matches like Intentional Program Violations (IPV's), non-custodial child support arrears, downstate clearance matches and allows staff to enter client-reported alerts like special assessment, fleeing felon, or Human Trafficking status.
Income	This section asks for all types of earned and unearned income. Wage and Unemployment Income Benefit (UIB) matches from RFI, Information Verification Service (IVS) income match, and Social Security Income (SSI) benefit matches from SDX are displayed in this section.
Medical	This section asks for information regarding temporary or long-term disability for anyone in the household.
Housing Expenses	This section will ask for rent or mortgage amounts, details of client's utility types and utility bills, including air conditioning. This section will also display any New York City Housing Authority/New York City Department of Housing Preservation and Development (NYCHA/HPD) Section 8 matches found in IVS. Additionally, it will show the SUA level after all information is saved.
Other Expenses	This section is for expenses like tuition, child support, dependent care, medical expenses, and other potential deductible expenses. This section will also display child support expense matches from IVS.
Resources	This section will show any RFI bank matches as well as a client's Categorical Eligibility. Staff have the ability to add resources for Non-Categorically Eligible households.
ABAWD	This section looks for any identified Able-Bodied Adult Without Dependents (ABAWD) in the household. If a person has any ABAWD strikes, the worker has a chance to re-establish eligibility and/or update strikes.

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13. Interview Review: Addition of Line Number for Individual Member Details

The Worker or Supervisor will be able to see the line number for the individual in the **Individual Member Details** on **Interview Review** screen. The WMS line number is displayed after the individual's name in the **Member Detail header** in the **Household Details** section of the **Interview Review** screen. This is included in all processor and approval activities that includes the **Interview Review** screen, including **Review Case**.

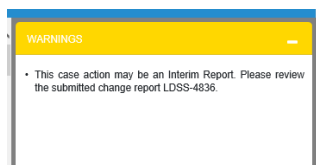
The screenshot displays the 'APPLICATION INTERVIEW' screen for 'Interview Review'. The left sidebar shows a navigation menu with categories like OVERVIEW, INTERVIEW, HOUSEHOLD DETAILS, INCOME, MEDICAL INFORMATION, EXPENSES, RESOURCES, ABAWD, DOCUMENT REVIEW, BUDGET, TAD, GRANTS, FORMS, and PROCESSOR SUMMARY. The main content area is divided into sections: 'Household Details' (with sub-sections for Contact Information, Residential Address, and Visually Impaired), 'Member Detail' (showing a household of 1 casehead, female, with a line number), and a table of individual details. The table includes columns for Social Security Status, Social Security Number, Ethnicity, Marital Status, Born in NYC?, and US Citizen/National. A 'NEXT' button is visible at the bottom right.

Individual	Social Security Status	Social Security Number	Ethnicity
1	B No match on name		White

Individual	Marital Status	Born in NYC?	US Citizen/National
1	Single/Never Married	Yes	Yes

14. Interview Review: New Warning in SNAP Change Case Data for F15 cases

When a Worker is processing a case in the **F15** Center in WMS while accessing the **SNAP Change Case Data** activity, the LDSS-4836 NYSNIP FS Benefits Interim Report (NYC) (**LDSS-4836**) form in the case record in the past 90 days, the system displays the following warning on the Interview Review screen: "This case action may be an Interim Report. Please review the submitted change report LDSS-4836."



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15. Interview Review: Childcare Provider Details are Shown

On the Childcare Provider Income Details on the **Interview Review** screen, the processor can view details of the care provided, days worked and gross per week for the childcare provider income to evaluate detailed entries made by the interviewer or another processor.

Income Detail :
Match

/2 - Employed Childcare Provider - ACCIS

Type of Work	Childcare Details	Employment Start Date	Pay Frequency
Childcare Provider	YY, XX	08/01/2020	Weekly
Hours Per Frequency	Period 1 Pay	Period 2 Pay	Period 3 Pay
26	\$ 93.42	\$ 93.42	\$ 93.42
Period 4 Pay	Monthly Net Income	Client Dispute	Dispute Outcome
\$ 93.42	\$ 60.92	Currently not providing care for any children	Document Satisfies Dispute
Number of Children: 2			
Child Full Name	Care Provided In	Days Worked Week 1-4	Gross Pay/Service Week 1-4
	Outside Home	5, 5,4,4	\$100, \$100, \$80, \$80
	At Home	6, 7,6,7	\$120, \$140, \$120, \$140

16. Interview Review: Add Error actions to SNAP SIC for authorized Supervisors

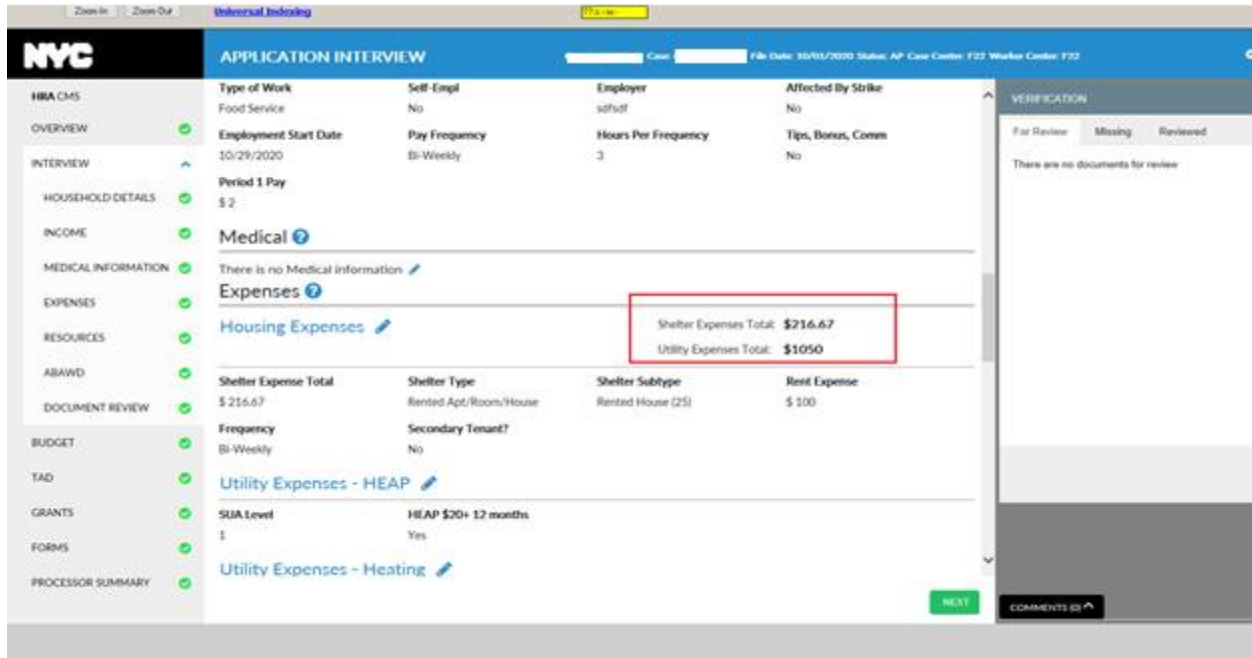
Error actions to the **SNAP Settle In Conference** (SIC) activity for Supervisors who can cancel an action where the error cannot be fixed. SPOS transmits the cancellation of the Error action to WMS when selected. Supervisors or managers will be able to select an Error transaction for cancellation where the error cannot be fixed in the **Transaction Details** section on the **Interview Review** screen for the **SNAP SIC activity**.

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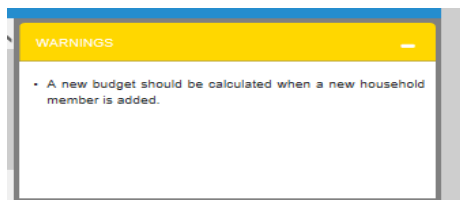
17. Interview Review: Housing Expenses Update

A new field named **Shelter Expenses Total** appears on the Housing Expense Title Bar, and a new field named **Utility Expenses Total** appears on a separate row within the **Housing Expenses** section of the **Interview Review** screen. The calculated total of Housing expenses is displayed in the **Shelter Expense Total** field. The calculated total of Utility expenses appears in the **Utility Expense Total** field.



18. Interview Review: Warning for adding new case member

A warning message appears on the **Interview Review** screen for activities on active cases (**Recertification, Change Case Data, Supervisor Return Activities, Error Correction Activities**) whenever a new member is added to the case, to remind the Worker that a new budget needs to be calculated. This helps prevent WMS errors.



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19. Budget: Improvement for Summing Incomes of the Same Type into A Single Income Source Code

SPOS will add Income Source codes of the same type as listed below. The Workers don't have to combine income in the interview for individuals with multiple jobs and unearned income types of the same type:

Income Source code list:

- **01** Salary, Wages
- **05** Family Day Care Provider Income
- **06** Net Business Income/Self- Employment Income
- **08** Net Income from Rental of House, Store or Other Property; Worked More than 20 hours Per Week
- **09** Net Income from Rental of House, Store or Other Property; Worked Less than 20 hours Per Week
- **11** Income from Boarder, Boarder/Lodger
- **12** Net Income from Lodger
- **13** Adoption Subsidy
- **14** Court Ordered Alimony, Spousal Support, Child Support Payment
- **15** Dividends, Interest or Periodic Receipts from Stocks, Bonds, Mortgages, Bank Accounts, Trust Funds, Annuities, Credit Unions, Estates, etc.
- **16** Black Lung Disease Program
- **17** Educational Grants and Loans
- **18** Disabled Veteran's Benefits (Service Connected)
- **19** Disabled Veteran's Benefits (Non-Service Connected)
- **21** NYS Disability Insurance
- **22** Railroad Retirement Benefit
- **23** Railroad Retirement Benefit - Dependent
- **24** Pensions, Retirement Benefit
- **25** Severance Pay
- **26** Sick Pay (Individual Provided Insurance)
- **27** Social Security Disability Benefit
- **28** Social Security Survivors Benefit
- **29** Social Security Retirement Benefit
- **30** Social Security Dependent Benefit
- **31** SSI Benefit
- **32** Union Benefits
- **33** Workers Compensation
- **36** Unemployment Insurance Benefits
- **55** Veteran's Benefits or Pension
- **98** Other Earned Income
- **99** Other Unearned Income

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20. Budget: Display Income Source Code for Hours Worked

The Processor or Supervisor can view Income Source codes that help populate the **Hours Worked** field in the budget to understand how the **Hours Worked** total was calculated.

The screenshot displays the 'Budget' screen in the NYC system. The interface includes a sidebar with navigation options like 'OVERVIEW', 'INTERVIEW', 'BUDGET', 'TAD', 'GRANTS', 'FORMS', and 'PROCESSOR SUMMARY'. The main content area is titled 'Budget' and contains two sections: 'Household Detail' and 'Individual Detail'. The 'Household Detail' section shows information such as SNAP Case Status (ACTIVE), Effective Dates (01/21/21), Number in Household (1), Shelter Type (Unfurnished Apartment or Room), Shelter Amount (\$950.00), SIA Level (1), and Shelter Amount (\$801.00). The 'Individual Detail' section shows SNAP Individual Status (ACTIVE), Employment Status (Employed Full Time or Part Time), Monthly Hours Worked (130), Incomes (OS-Family Day Care Provider Income), Income Frequency (Weekly), Gross Amount (\$200.00), and Exemption (Provider Daycare Exemption Amount). A 'CALCULATE BUDGET' button is visible at the bottom of the main content area. On the right side, there is an 'ALERTS' panel with a message: 'Hours worked are related to OS-Family Day Care Provider Income'. Below the alerts is a 'VERIFICATION' section and a 'COMMENTS' section.

21. Budget: Help Text

- The Worker can view the Help text by clicking the **Help** icon on the top of the **Budget** screen to get assistance in using the screen.

Help text displays as follows: "The Budget screen allows you to review all information for the case that will be used to calculate a potential benefit. Use the pencil icons to return to the interview sections to update any information. Click the Budget History tab to view prior budgets on this case."

22. Budget: Warning for Adding a New Household Member

To remind the Worker that a new budget needs to be calculated, a warning message appears on the **Budget** screen for activities on active cases (**Recertification, Change Case data, Supervisor Return Activities, Error Correction Activities**) whenever a new member is added to the case.. This helps prevent WMS errors.

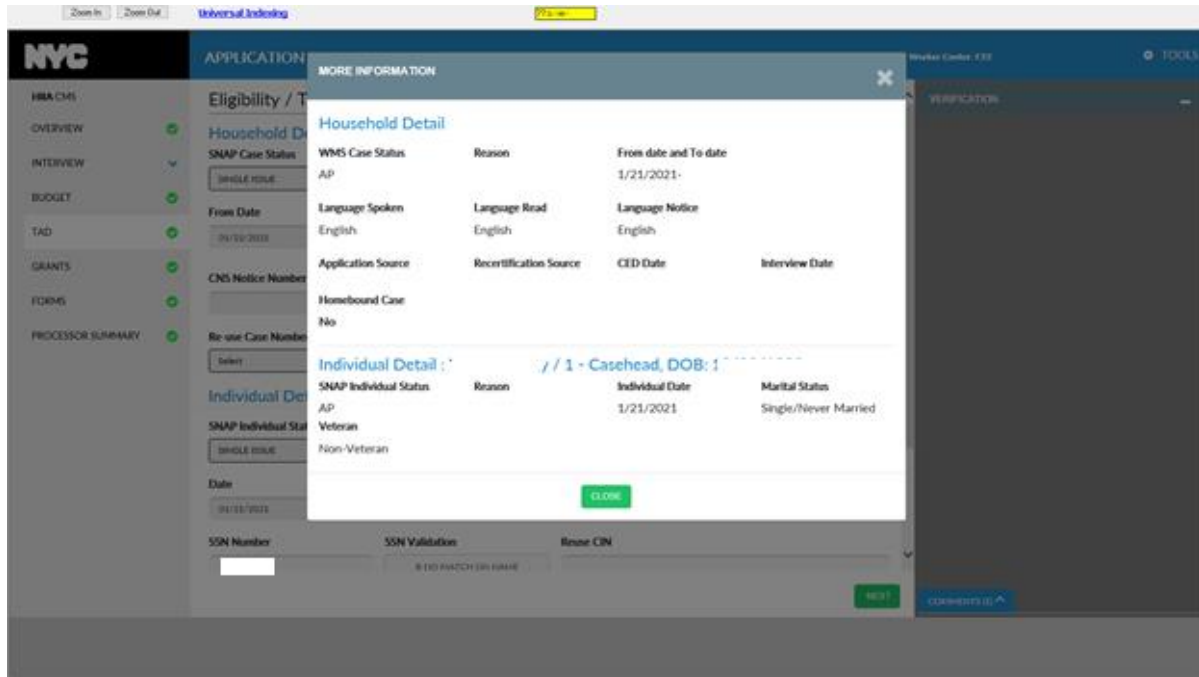
The screenshot shows a 'WARNINGS' panel with a yellow header. The warning message reads: 'A new budget should be calculated when a new household member is added.'

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23. TAD: Addition of Individual Date from WMS in More Information

The Worker will be able to see the **Individual Date** that the latest status was changed in WMS on the **TAD More Information** popup window. This change is made in all activities where the **SPOS TAD** window appears including Worker activities, Supervisor activities and **Review Case**.



24. TAD: ORIA Warning for Rejection/Closing Code F92

The Processor will see a warning message appear as a reminder to follow the policy for case accuracy whenever they use Rejection or Closing Code **F92** at the case or individual level in the TAD screen.

This message will appear in the following SPOS activities:

SNAP Application Interview, EC- SNAP Application Interview, SNAP Recertification Interview, EC- SNAP Recertification Interview, SNAP Change Case Data, EC-SNAP Change Case Data, ESNAP Issuance, EC-ESNAP Issuance.

Message text for processors appear on the TAD when the conditions are met: "You must first contact ORIA for an internal clearance at ORIA@dss.nyc.gov before sending this case for approval. Please email ORIA, copying your supervisor, with the case details (case number, names of noncitizens), and the reason they are ineligible non-citizens."

25. TAD: Help Text

- The Worker can view the Help Text by clicking the **Help icon** on the top of the TAD screen to get assistance in using the screen.

The Help text message displays as follows: "The TAD screen allows you to review all information for the case that will help enter a decision for eligibility. Use the pencil icons to return to the interview sections to update any eligibility information. Click the More Information link to view additional case information."

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26. TAD: Business Rules for Reason Codes M73 and M74 Usage

New business rules were added on the TAD for reason codes **M73** and **M74**:

- Use of **M73** and **M74** Status Reason Codes displays a warning message "A person on this case has a current CA sanction or has reduced their work hours for benefits, assess for M73 or M74 rejection." The TAD screen warns the processor that use of rejection codes **M73** and **M74** for proper sanction rejection should be considered.
- **M73** and **M74** usage displays a warning on the TAD that tells when individual level rejection codes **M73** or **M74** should be used for the proper sanction rejection. Message text indicates if code **M74** is used: "Individual rejection code **M73** must be used for household size of 1". Message text indicates if code **M73** is used: "Individual rejection code **M74** must be used for household size greater than 1".

27. TAD: CDC Field Prefilled with Value of M

For Processors, the **CBIC CDC** field is prefilled with a value of **M** on the TAD for the Casehead whenever a TAD is transmitted from POS unless an **M** already exists under the following circumstances:

- When applying AP status to SI status.- When applying AP status to AC status.
- When processing a case reopening from closed CL status to AC.

28. TAD: Warning Message When Using M3E Indicator

Staff are alerted when the **M3E** indicator is triggered on the TAD. A warning message is displayed on the TAD alerting the Worker that using the **M3E** indicator **A** (CNS notice suppressed, manual notice required [Adequate action]) or the **M3E** indicator **T** (CNS notice suppressed, manual notice required [Timely action]) when the Case Status Reason and the Individual Status Reason do not begin with **Y**.

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Message Text: “Using the M3E indicator notice will not send a notice via CNS (Client Notice System). Please only use this if you want to suppress the CNS initiated notice.”

Note: A Status Reason code beginning with the letter **Y** means that the case doesn't require a CNS notice or a manual notice.

The screenshot displays the 'APPLICATION INTERVIEW' interface for 'Eligibility / TAD'. The left sidebar shows navigation options: OVERVIEW, INTERVIEW, BUDGET, TAD, GRANTS, FORMS, and PROCESSOR SUMMARY. The main content area is divided into 'Household Detail' and 'Individual Detail'. The 'Household Detail' section includes fields for SNAP Case Status (SINGLE ISSUE), Status Reason (A32-1st Month Prorate - Applied Before the 1st), From Date (07/24/2020), To Date (mm/YY/yyyy), WMS Budget Number, Budget Result, CNS Notice Number, M3E Indicator (T-Manual Notice - Timely Action), and Re-use Case Number. The 'Individual Detail' section includes SNAP Individual Status (SINGLE ISSUE), Status Reason, Date, SSN Number, SSN Validation (E-NO MATCH ON NAME), and Re-use CIN. A 'NEXT' button is visible at the bottom right. A yellow warning message is displayed on the right side of the interface, stating: 'Using the M3E indicator notice will not send a notice via CNS (Client Notice System). Please only use this if you want to suppress the CNS initiated notice.'

29. TAD: Warning Message When SUA Level is Upgraded

The TAD displays a warning message for the following activities:

- **SNAP Application Interview** (case is in SI status in WMS and AC status in SPOS).
- **Recertification Interview** (case is in AC status in WMS and AC status in SPOS).
- **Change Case Data** (case is AC status in WMS and AC status in SPOS), and their
- Error Correction (**EC - SNAP Application Interview**, **EC - SNAP Recertification Interview**, **EC - Change case Data**).
- Standard Utility Allowance (SUA) Level is **UPGRADED** from Level 3 to Level 2, from Level 3 to Level 1, and from level 2 to level 1 to indicate a potential error.

Message Text: SUA increased from 3 to 2. Please verify entries for HEAP, rent/shelter expenses, and utilities.

Note: SUA Level is system determined in SPOS in the **Housing Expenses** section.

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30. TAD: Warning Message When SUA Level is Downgraded

A warning message on the TAD displays when SUA level is downgraded for activities:

- **SNAP Application Interview** (case is in Single Issuance status in WMS and Active status in SPOS).
- **Recertification Interview** (case is Active status in WMS and Active status in SPOS).
- **Change Case Data** (case is Active status in WMS and Active status in SPOS).
- **Error Correction (EC - SNAP Application Interview, EC - SNAP Recertification Interview, EC - Change case Data)** when the SUA Level is Downgraded from Level 2 to Level 3, from Level 1 to Level 2, and from level 1 to level 3 so that the Worker is aware of a potential error.

Message Text: SUA increased from 2 to 3. Please verify entries for HEAP, rent/shelter expenses and utilities.

Note: SUA Level is system determined in SPOS on the Housing Expenses section.

31. TAD: Valid Closing or Rejection Codes During COVID-19

The following error message is displayed when an entry is selected in the **Status Reason** drop-down during COVID-19 for the **SNAP Change Case Data** activity, and an invalid closing or rejection code is selected:

Display Error Message: "The selected code is invalid. Please use a valid code from the drop-down menu." The message appears on the TAD when the Worker selects an invalid Status Reason code during the COVID-19 period, so that an applicant/participant's case closing or rejection will be valid during this period.

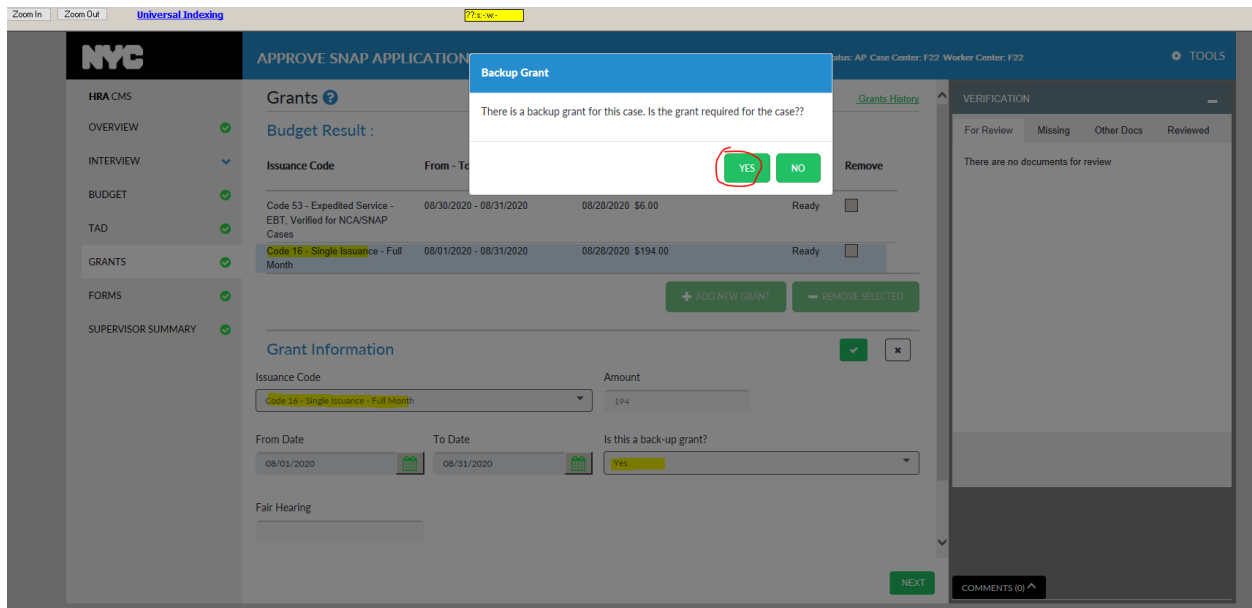
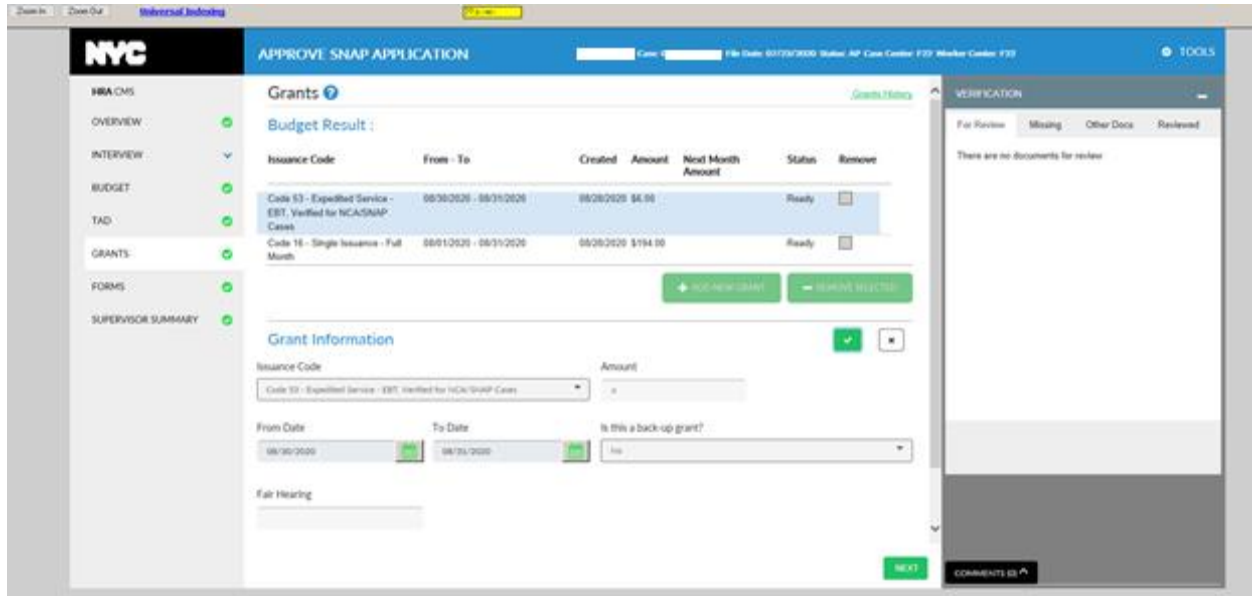
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32. Grants: Backup Grant for Supervisory Approval

Supervisors will be able to indicate whether a backup grant should be transmitted to WMS when needed by an applicant/participant. Supervisors must decide whether the backup grant should be transmitted. Supervisors receive a dialog box with **Yes** and **No** buttons with the following prompt: “There is a backup grant for this case. Is the grant required for the case?”

- If the Supervisor clicks **Yes**, the value of the **Backup Grant** field must be updated to **No** so that the grant will be transmitted to WMS.
- If the Supervisor clicks **No**, the grant must be deleted so that it will not be transmitted to WMS.



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33. Grants: Help Text

The Worker can view the Help Text by clicking the **Help** icon at the top of the **Grants** screen for assistance in using the screen.

Help Text displays as follows: "The Grants screen allows you to review all grants already issued as well as the ability to enter new grants for a case. Use the Add New button to generate a new grant. Click Grant History to view all grants issued for the head of household. "

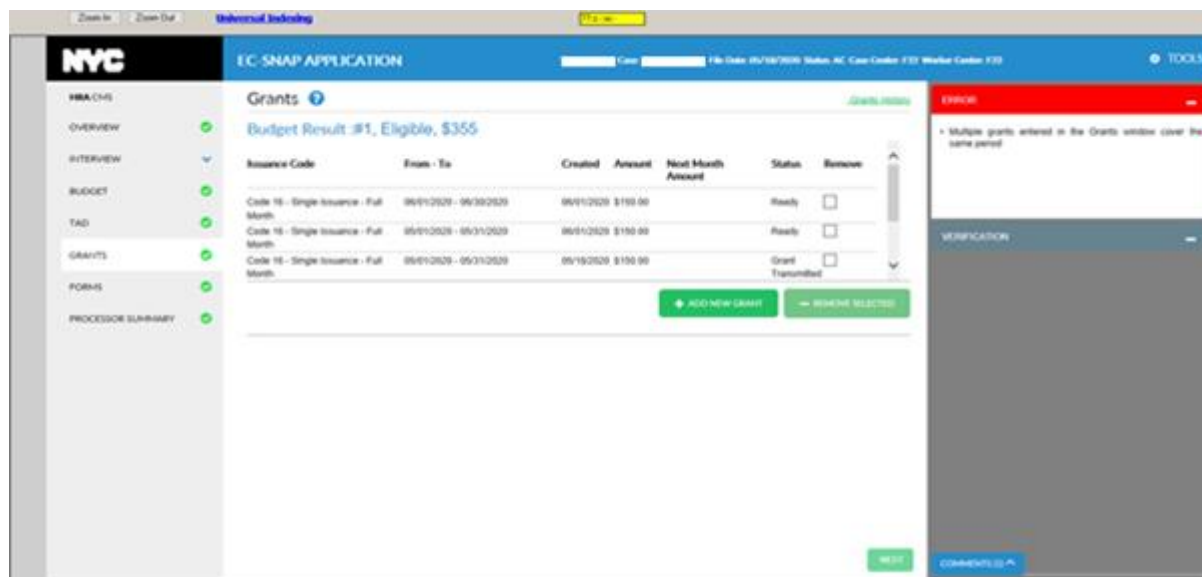
34. Grants: Prevent Duplicate Grants

An error message displays on the **Grants** screen that prevents the Worker from duplicate entry of SPOS Grants for activities:

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

The error message appears so that the Processor/Worker won't receive an error when grants are transmitted to WMS.

Message Text: Multiple grants entered in the Grants window cover the same period.

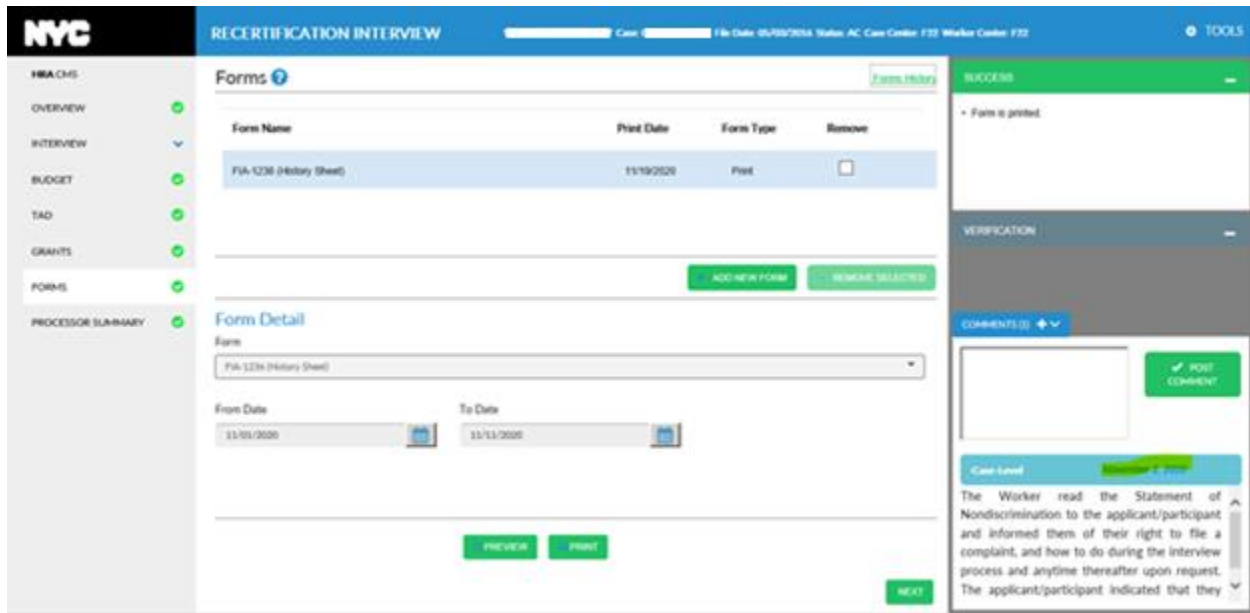


35. Forms: Add Print Case Comment functionality, Forms FIA-1236

- The Processor will be able to print **Case Comments** from SPOS activities, using the **FIA-1236** form from the **Forms** screen.
- The Worker can enter the desired date range for comments to be displayed on the form by entering the **From Date** and **To Date** on the **Form** detail. The processor can preview the form that will be generated. The form is printed, but not saved in the HRA One Viewer.

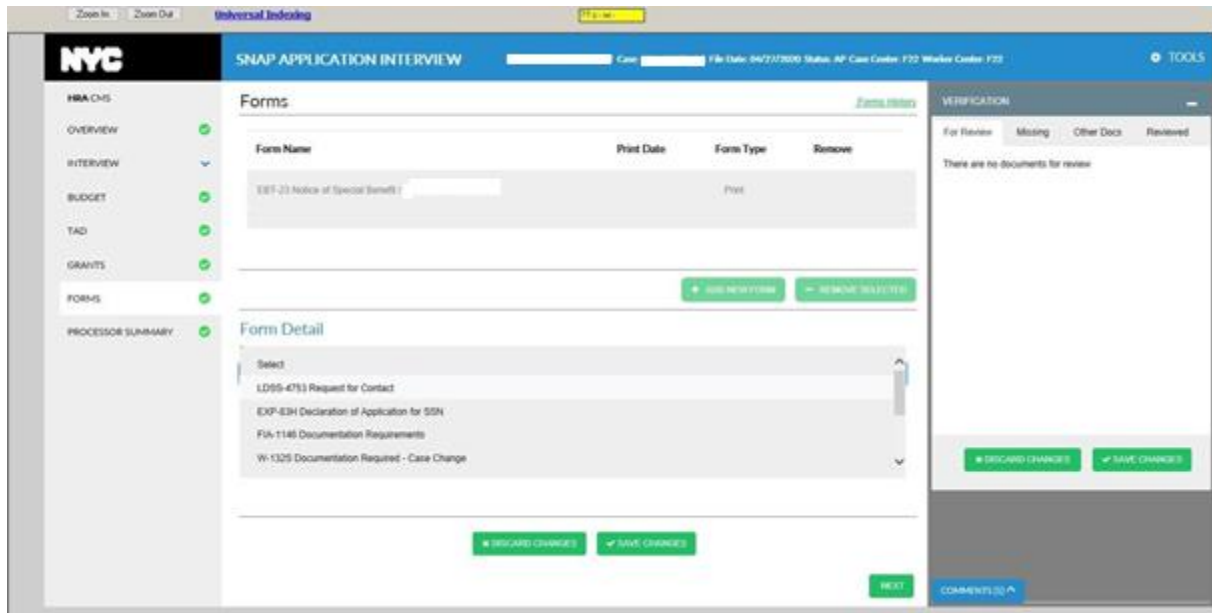
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36. Forms: Additional Forms are added

The **LDSS-4753** form, and the **M-3mm** form have been added to the **Forms** window. The **LDSS-3152** and the **EBT-23** have been moved from the **Notice Selection** window of Classic POS to the **Forms** window in SPOS. These forms can be generated by role within SPOS.



Note: The **EBT-23** form is generated only after **Grants** data entry is completed on the **Grants** Screen. The **EBT-23** form is a Print to Mail (PTM) only Form and is used to notify an applicant/participant about their benefits. This form is for Head of Household Only.

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37. Forms: Help Text

The Worker can view the Help Text by clicking the **Help** icon on the top of the **Interview Review** screen to get assistance in using the screen.

Help text displays as follows: "The Forms screen allows you to review all forms already issued for the case as well as the ability to generate new forms for a case. Use the Add New button to generate a new form. Click the Preview button to view any form that will be printed, or mailed, to confirm the data. Click Forms History to view forms generated for the case."

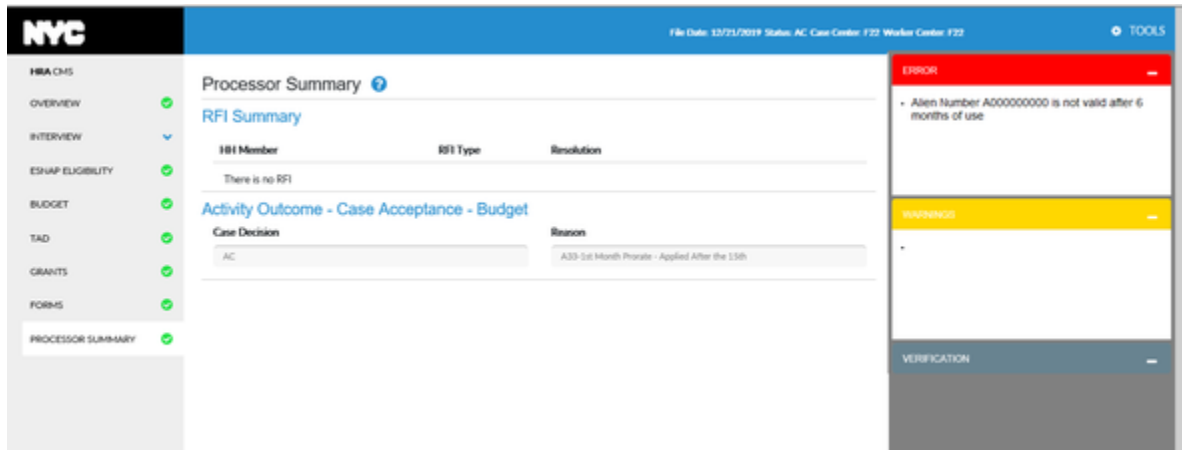
38. Forms: Business rule for LDSS-3152 Notice

The **LDSS-3152** form is only available when the Worker is in the **Application Interview** or the **Error Correction** section of **Application Interview**, and they select a value in the **M3E** indicator with a reason code that is not **Y45** (Other [Manual Notice Required]), **Y94** (Client Request To Withdraw Application - PA Only) or **Y99** (Other – Manual Notice Required).

39. Processor Summary: Completion Edit – Prevent Use of Alien Number A000000000 beyond Six Months

A completion edit is introduced that prevents use of the Alien Number **A000000000** beyond 6 months. The following error displays on the TAD: "Alien Number A000000000 is not valid after 6 months of use."

- The edit runs in the **SNAP Recertification Interview** and **EC - SNAP Recertification Interview** actions when the Worker clicks the **Submit** button on the **Processor Summary** screen.
- The edit runs in the **Approve SNAP Recertification Interview** and **Approve EC - SNAP Recertification Interview** actions when the Supervisor clicks the **Complete** button on the **Supervisor Summary** screen.



40. Processor Summary: Completion Edit – SSN Validation codes

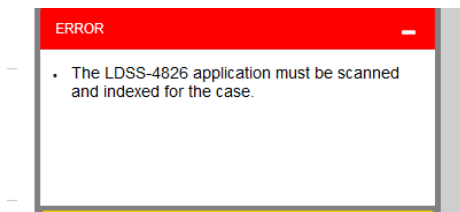
To reduce the WMS error rate for the Worker, there are edits that prevent errors for Social Security Number (SSN) Validation codes. If there are problems with the SSN validation code being used, a red error message will display on the **Processor Summary**, as in the screen listed on the next page.

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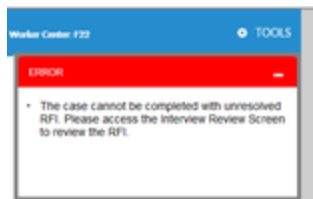
41. Processor Summary: Completion Edit – Check for the SNAP Application Form

A completion edit checks for the application form and alerts the Worker that a case cannot be completed without the required forms in the case record. The following error message appears: “The LDSS-4826 application must be scanned and indexed for the case”.



42. Processor Summary: Completion Edit – Warning for Unresolved RFI

The RFI resolution information is available on the **Processor Summary**. If an unresolved RFI exists on the case, the system displays the following error message: “The case cannot be completed with unresolved RFI. Please access the Interview Review Screen to review the RFI.”



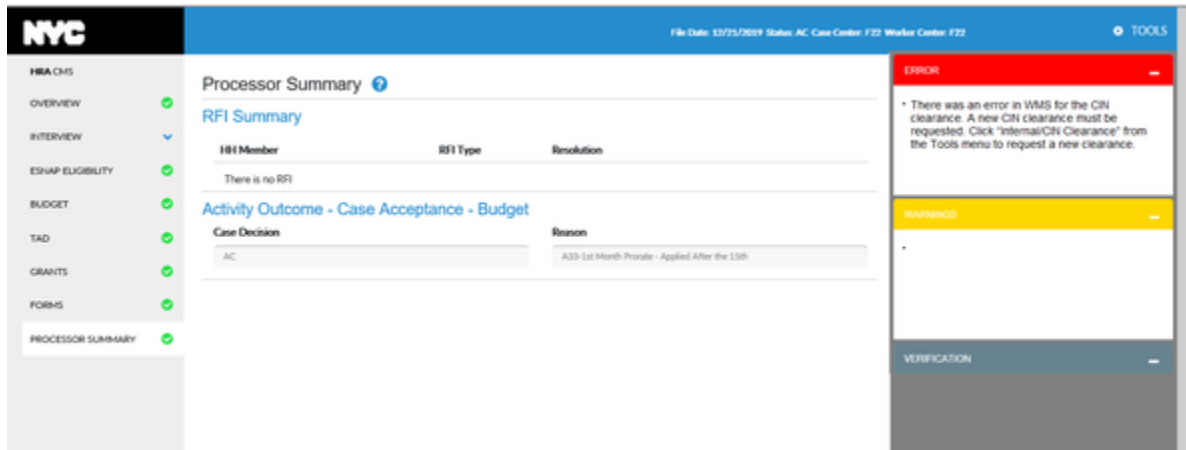
43. Processor Summary: CIN clearance Failure in WMS

When there is an individual in AP status on the case and the CIN clearance failed, SPOS displays a new warning message “There was an error in WMS for the CIN clearance. A new CIN clearance must be requested. Click “Internal/CIN Clearance” from the Tools menu to request a new clearance.”

The Worker can run a new clearance to prevent a WMS error.

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44. Processor Summary: Help Text

- A Processor can view the Help Text by clicking the **Help** icon on the top of the **Processor Summary** screen to get assistance in using the screen.

Help text displays as follows: "The Processor Summary screen allows you to review any RFI matches for the case along with their resolution codes as well as the decision entered for the case. Use the Verification Widget to update any document's status, as well as confirm information to ensure the decision made on the case is the right decision. This is where staff will click Submit and send the case to the approving supervisor."

45. Processor Summary Screen Update to Complete Activities

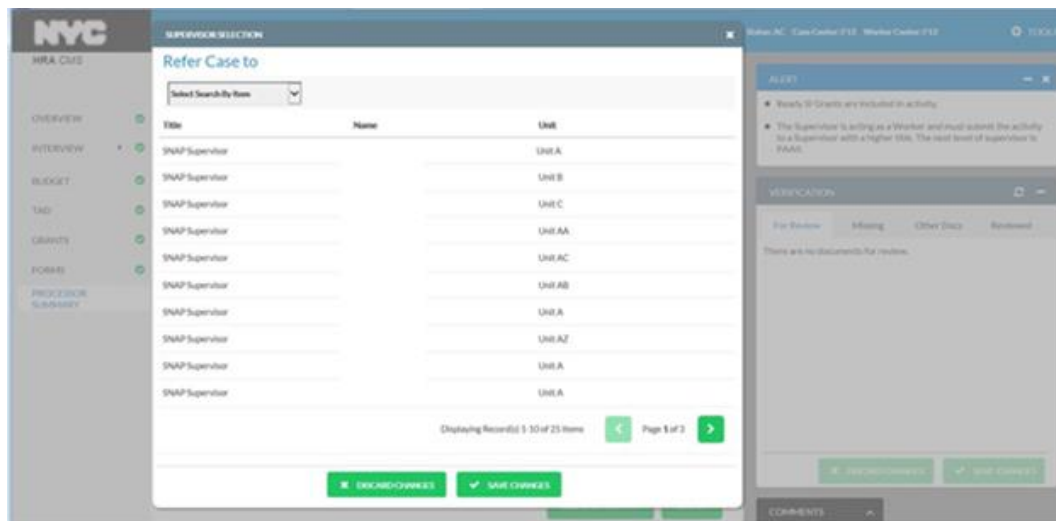
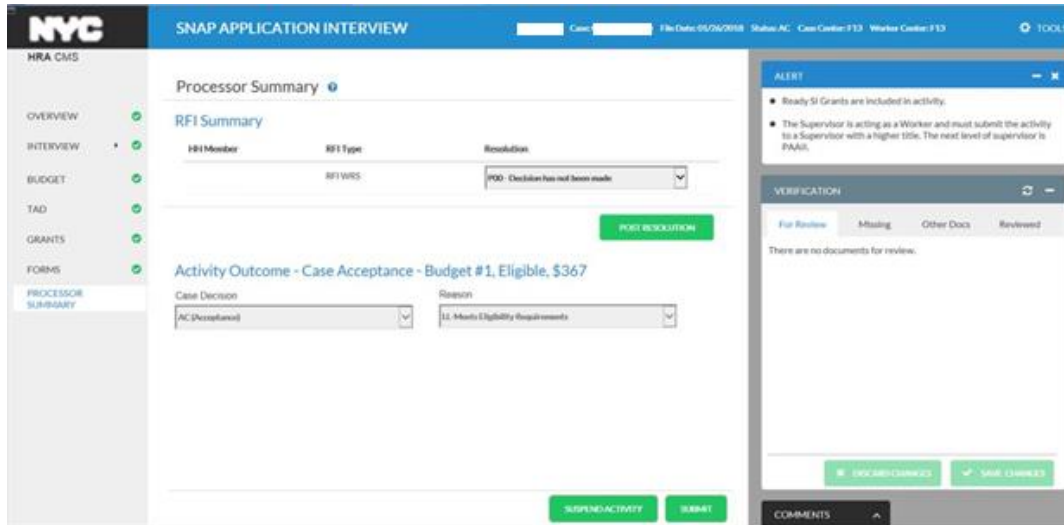
There are no Classic POS windows to finish activities.

- Processors must click the **Submit** button (on the bottom right-side corner of the **Processor Summary** screen), to access the **Supervisor Selection** dialog box to submit the case to their Supervisor.
- Once a Supervisor is selected, click on **Save Changes** to send the case to the Supervisor's queue.

Note: The Worker's assigned Supervisor in POS enrollment is pre-selected as the default option but the Worker can change the selection and choose another supervisor.

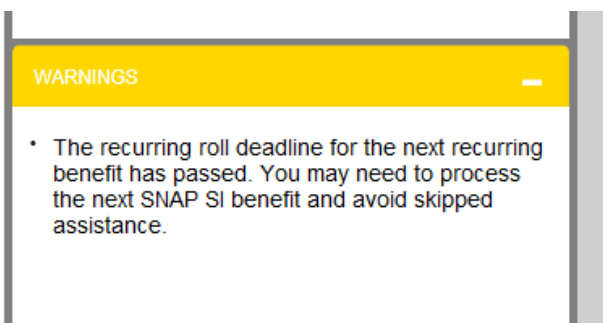
Streamlined POS Release Notes

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46. Processor Summary and Supervisor Summary: Skipped Benefit Warning Messages for Recertifications

The Worker will be warned when there may be a skipped benefit situation for a recertification case in order that it can be addressed without the participant missing their assistance. Display of a warning message when the **Processor Summary** and **Supervisor Summary** is accessed.



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47. Supervisor Summary: Help Text

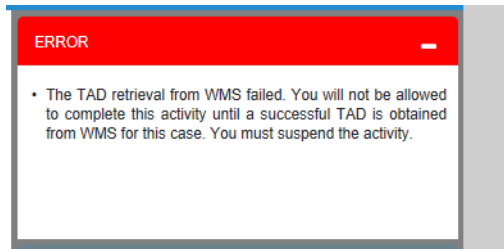
- A Processor can view the Help Text by clicking the **Help** icon on the top of the Supervisor **Summary** screen to get assistance in using the screen.

Help text displays as follows: "The Supervisor Summary screen allows you to review all the data entered on that case at a glance. Supervisors can see the RFI summary, Activity Outcomes, line level decisions, any parts of the activity that have been disapproved, as well as the ability to view the documents on the Verification Widget."

48. Supervisor Summary: Display Message if WMS is Not Available

An error message will display informing the Worker to suspend the case if WMS was not available at the time that activity was opened to avoid submission of an invalid action that will cause WMS errors.

When connection to WMS fails, the following message displays informing the Worker to suspend current activity: "The TAD retrieval from WMS failed. You will not be allowed to complete this activity until a successful TAD is obtained from WMS for this case. You must suspend the activity."



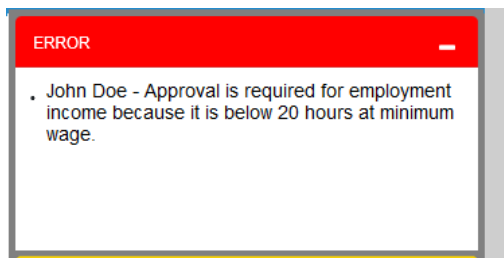
49. Supervisor Summary: Check for Minimum Self-Employment Income

An error message for the Supervisor will display at activity completion when there is weekly employment income below 20 times the Federal Minimum Wage that they have not approved.

The Supervisor is required to review this information to prevent possible errors. This error message displays: "[Name of client with income] - Approval is required for employment income because it is below 20 hours at minimum wage". The error is triggered in the **Supervisor Summary** window.

This edit runs for the following activities:

- Approve **SNAP Application Interview**
- Approve **SNAP Recert**
- Approve **EC - SNAP Application Interview**
- Approve **EC - SNAP Recert**



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50. Supervisor Summary Screen Updates for Activity Completion and Transmission

Supervisors can now finish approval activities completely within SPOS. There will no longer be any Classic POS windows at the end of activities. There is new functionality associated with the **Complete** button and the **Return to Worker** button.

The screenshot shows the 'APPROVE ESNAP' interface. The left sidebar lists navigation items: HRA CMS, OVERVIEW (checked), INTERVIEW (dropdown), ESNAP ELIGIBILITY (checked), BUDGET (checked), TAD (checked), GRANTS (checked), FORMS (checked), and SUPERVISOR SUMMARY (checked). The main content area is titled 'Supervisor Summary' and includes three sections: 'RFI Summary' (with a table showing 'There is no RFI'), 'Activity Outcome - Case Acceptance - Budget' (with a table showing 'SI'), and 'Disapproval Outcome' (with a table showing 'There is no Disapproval Outcome'). At the bottom right, there are two green buttons: 'RETURN TO WORKER' and 'COMPLETE'.

Complete button: The **Complete** button appears at the bottom right-side corner of the **Supervisor Summary** screen for the Supervisor to complete an action and send a transaction to WMS when needed.

Return to Worker button: The **Return to Worker** button appears at the bottom of the **Supervisor Summary** screen to return the case to a Worker for revisions. When **Return to Worker** is selected, a dialog box listing the Workers opens. The Worker who sent the case is selected by default, but the Supervisor has the option to choose another Worker, Supervisors may search for Workers by title, name, or unit.

- The Supervisor clicks **Save Changes** after selecting a Worker and the case is sent back to the Worker.

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51. Business Rules: Supervisor Return Function

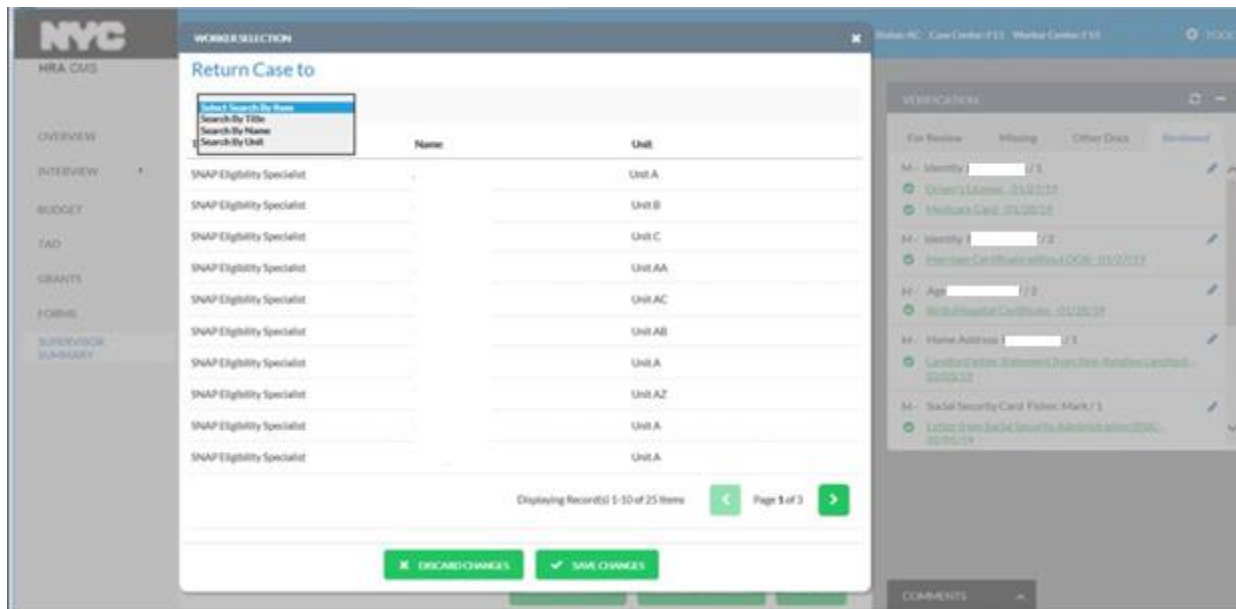
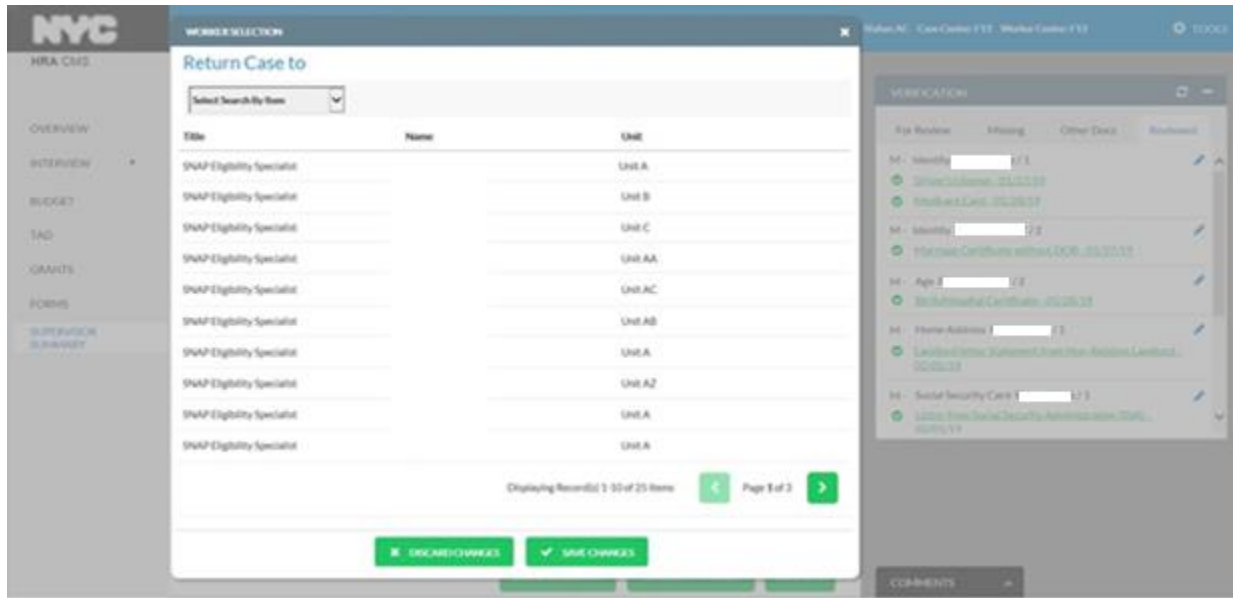
The **Supervisor Summary** screen displays an error message for the below activities when the Supervisor attempts to return a SPOS activity to a Worker without entering a comment and without disapproving a section of the activity.

- **Application Interview**
- **Recertification Interview**
- **ESNAP**
- **Change Case Data**
- **Failed to Keep Application**
- **Case Transfer**
- Approval of Error Correction activities like (**Approve EC - SNAP Change**)
- **Case Data**
- Approve **SNAP Case Transfer**
- Approve **EC - ESNAP Issuance** (NCA SNAP)
- Approve **EC-FTK SNAP App Interview**
- Approve **EC - SNAP Application Interview**
- Approve **FTK SNAP Application Interview**
- Approve **EC - SNAP Recert**, Approve **ESNAP Issuance** (NCA SNAP Case)
- Approve **SNAP Change Case Data**
- Approve **SNAP Application Interview**
- Approve **SNAP Recert**)

The screenshot shows the 'APPROVE APPLICATION' screen in the NYC HRA CMS. The main content area is titled 'Supervisor Summary' and includes sections for 'RFI Summary', 'Activity Outcome - Case Acceptance - Budget', and 'Disapproval Outcome'. The 'Activity Outcome' table shows three rows with 'AC' status and 'LL-Meets Eligibility Requirements' reason. The 'Disapproval Outcome' section is empty. On the right side, there is an 'ERROR' message box with a red header and a yellow background, stating: 'Disapproval reason(s) or a detailed case comment are required before returning a case to a Worker. Please enter the disapproval reason(s) in the detailed Case comment.' Below the error message is a 'VERIFICATION' section. At the bottom of the screen, there are three buttons: 'RETURN TO WORKER' (circled in yellow), 'COMPLETE', and 'COMMENTS (0)'. The top navigation bar includes the NYC logo, 'APPROVE APPLICATION' title, and various status indicators.

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52. WMS Transmission: Integrate WMS Error Numbers Into Errors Displayed

The Worker or Supervisor can view WMS error(s) returned together with the transmission error message when a TAD and/or grant fails to transmit successfully to WMS to address any issues found. This applies to the following screens:

- **Processor Summary** when there is direct transmission to WMS of a TAD and/or Grant.
- **Supervisor Summary** when there is transmission to WMS by the Supervisor of a TAD and/or Grant.

Example: The error message for the TAD indicates: "The Transaction Posted Unsuccessfully (TAD). E1234 WMS Error Description."

Example: The error message for the Grant indicates: "The Transaction Posted Unsuccessfully (Grants). E2199 - NO PAYEE ON FILE."

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53. WMS Transmission: Eligibility

A TAD transmission to WMS for a case that is in AP status in WMS can be sent to the State for processing eligibility determinations.

Proper Transmission of Eligibility Transactions to WMS for their ongoing benefits include **SNAP Application Interview**, **ESNAP issuance**, **Error correction** activities and their corresponding supervisor approval activities.

54. WMS Transmission: Undercare

A TAD Transmission to WMS for a case that is in SI, AC or Closed (CL) status in WMS for an Undercare determination can be sent to the State for processing. Proper Transmission of Undercare transactions to WMS for their ongoing benefits include **SNAP Application Interview**, **SNAP Recertification Interview** and **SNAP Change Case Data**, **Error Correction** activities and their corresponding supervisor approval activities.

Supervisors can submit a TAD from SPOS to WMS for a case in AC status in WMS without changes to the SNAP case status and the undercare determination for a new budget selected, address changes and individual changes can be sent to the State for processing.

Pending Transactions:

```

© K13P02.00a
NQCS07 (Z) Pending Actions and Outstanding Items 09/08/20
Case # [REDACTED] Page 01 of 01
Next Recertification 03/04/21

Auth # Trns Forwarding Latest -Involved - - Form - Tx Action M3E FH
Typ - Date - - Date - Org Rsp Ent Prepared St Date Ind Batch St
99971586 0109 09/04/20 / / F22 F22 F22 09/04/20 02 09/04/20 E2KEG
99971708 0109 08/26/20 / / F22 F22 F22 08/26/20 03 08/26/20 E2KEG
99971734 0109 08/25/20 / / F22 F22 F22 08/25/20 03 08/25/20 E2KEG

Place an -X- by the desired Pending Action
Next Case: CMD
    
```

Case level Data:

```

© K13P02.00a
NQCP01 (Z) Pending Case Level Data 09/04/20
Case: [REDACTED]
----- Control Information -----
Auth # Trns -- Forwarding -- -Involved - - Form - Tx Action M3E
Typ - Date - - Time - Org Rsp Ent Prepared St Date Ind Batch
99971586 0109 09/04/20 10:54:08 F22 F22 F22 09/04/20 02 09/04/20 E2KEG
----- Transaction -----
Registry Auth: ---PA--- ---FS--- Unit Budget Fiscal MA
Case no. Number Eff Date Eff Date Ctr Worker No. Dist Resp TI
NYCHA Proj # Acct # APP SRC BCRT SRC HPI
Residence House # Street CENTRAL PARK CIR Apt.
Address City/Town State ZIP
Phone ( ) - Utility Guarantee
Mailing Address City/Town State ZIP Apt. Notice/Budg #
Address Din Facility Name
Contact Agency Name Phone ( ) -
Agency Name
Recert Info|Last Recert Date / / CED Worksheet Req Date / / FSINTW
CMD
    
```

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55. WMS Transmission: Grants

Eligibility determinations can be sent to the State for processing of Grant Transmissions to WMS for a case that is in AP status in WMS

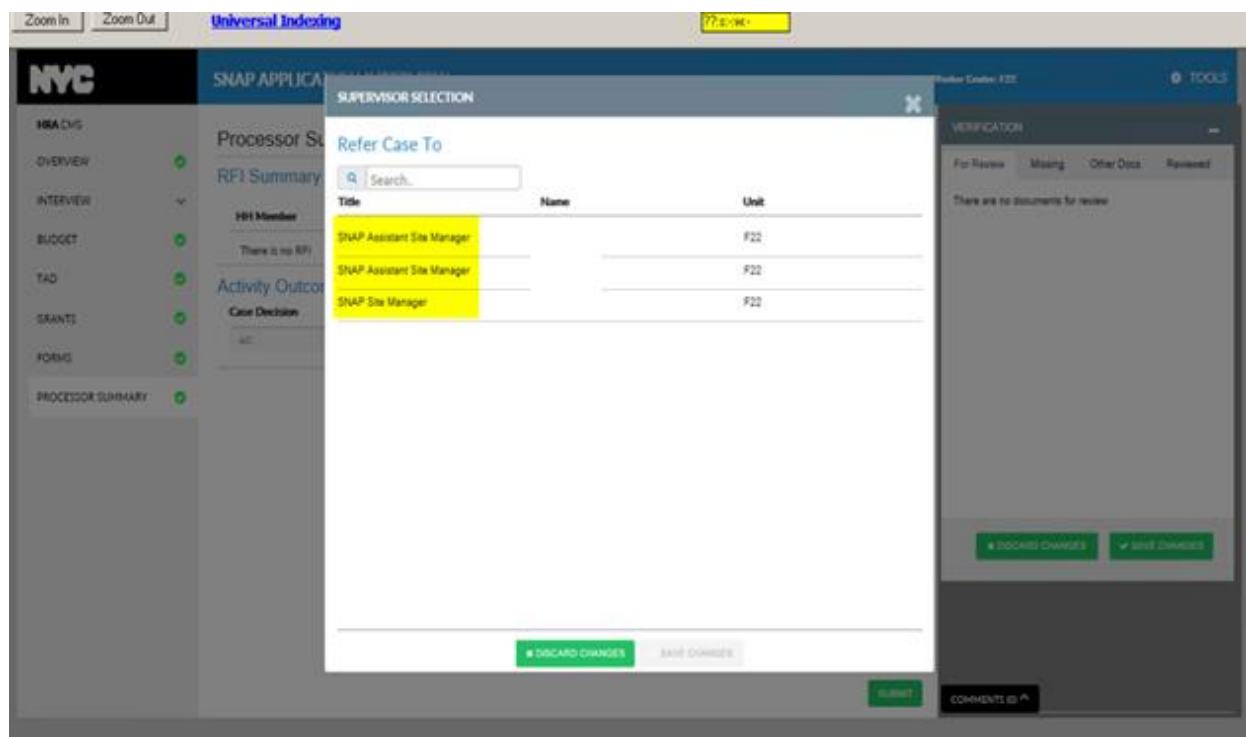
Proper Transmission of grants to WMS for their ongoing benefits include **SNAP Application Interview**, **SNAP Recertification Interview** and **SNAP Change Case Data**, **ESNAP activities**, **Error Correction** activities and their corresponding supervisor approval activities.

56. WMS Transmission: Determining Originating Center for TAD and Grants

The Worker can track transactions in reports and **WMS Inquiry** screens if the proper Center ID is transmitted as the originating center when a TAD or grant is done.

57. Business Rules: Supervisory Review - Levels of Approval

Automated approval logic in SPOS 4 allows for the proper level of review to be processed along with the correct Supervisors appearing in the **Supervisor Selection Dialog** window.



58. Business Rules: Selective Case Review

The **Selective Case Review** business rules determines whether the case action can be transmitted directly to WMS when it is completed in SPOS, so that the cases that should be directly transmitted go to WMS and all other cases go to the selected Supervisor.

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Case and Worker attributes for Selective Case Review

There are certain case attributes the system must track to determine whether the case meets the criteria for Selective Case Review (**SCR**) or not. The system can thus determine whether direct transmission to WMS can be done from a Worker's action, skipping the Supervisor review.

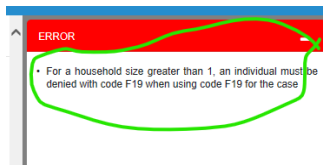
Attributes captured in SPOS and available for use in business rules and SCR determination by the time the case action is completed by the processor:

1. Budget change
2. Child Added
3. Demographic change
4. Earned income
5. Homebound casehead
6. Household change
7. No-change recertification
8. Homeless case with no income and no rent
9. Non-citizen on case
10. Re-Applicant Case
11. SNAP benefit amount less than \$37

59. WMS Transmission and Business Rule: SPOS TAD and Transmission Updates for Denial/Closing Code F19

The Worker can now select Denial/Closing Code **F19** (Refusal to Cooperate with Quality Control) at the **SNAP Case Status** and Individual Level Status on the TAD when the household size is greater than one. If **F19** is used on the Case Level Status Reason, then the Worker must indicate **F19** at the **Individual Status Reason** otherwise error messages will be displayed.

The Worker can enter Denial/Closing Code **F19** at the **SNAP Case Status** and **Individual Level Status** in this situation, allowing the TAD to be completed in one transaction.



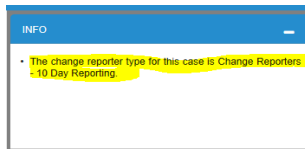
60. Business Rules: SNAP Change Case Data

- Income Reported during the Month the Change Occurred: The “Income reported during the month the change occurred” rule will only run in the **Interview Review** window in back-end for **SNAP Change Case Data** and **EC- SNAP Change Case Data** activities.
- Deferrals for simplified change reporters: This is a business Rule that alerts the Worker to process changes when a simplified change reporter's income is above the 130% of the poverty level to complete the required action.

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- Determine change reporter type for **SNAP Change Case Data**: Determine the type of change reporter and display an informational alert on the **Interview Review** screen when in **SNAP Change Case Data**, **Approve SNAP Change Case Data**, **EC-SNAP Change Case Data**, **EC Approve or SNAP Change Case Data**.
- Change reporter types are **Change Reporter – 10-day reporting**, **Transitional Benefit Assistance**, **New York State Nutrition Incentive Program (NYSNIP)**, **New York State Council on Adolescent Pregnancy (NYSCAP)**, and simplified 6-month change reporting.

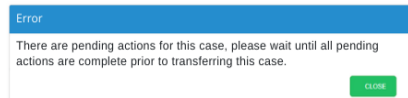


61. Business Rules: SNAP Case Transfer

An error message is displayed when the Worker tries to initiate a **SNAP Case Transfer** activity for a case with pending actions in WMS or SPOS. Open actions are handled before changing the center ID for the case.

Pending Action in WMS (with WMS Transaction Type **0107** (Eligibility) with Transaction Status **02** (Error) or **04** (Suspended/Clock Down).

Pending Actions in SPOS for the following activities: **SNAP Application Interview**, **SNAP Recertification Interview** or **SNAP Change Case Data**, or any Error Correction of these activities, any approval of these activities, or any approval of error correction of these activities.)

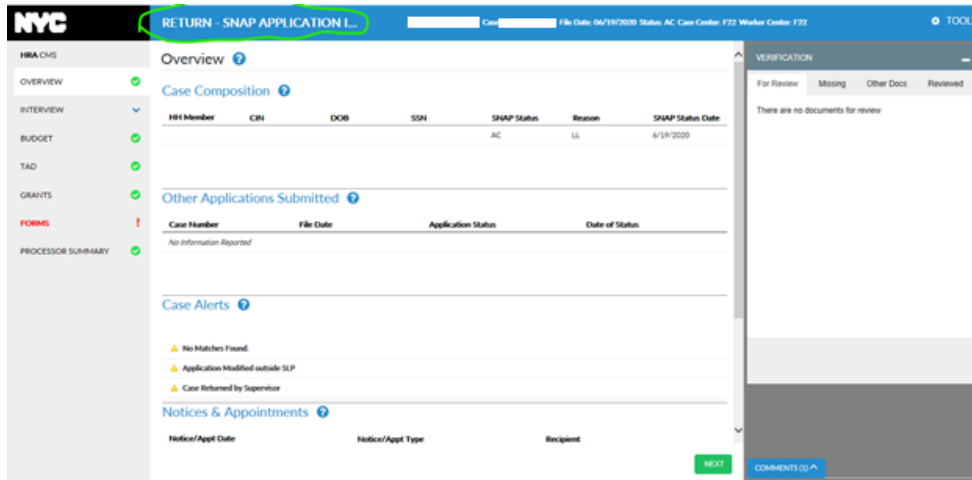


62. Activity header update: heading for activities returned by supervisor

The Processor can see the word *Return* in the header bar label if the case action was returned by the Supervisor. This will allow the Processor to follow up on fixing issues identified by the Supervisor. The new label only appears if the action was returned by a Supervisor with activities that include: **Return - FTK SNAP Application Interview and Return - EC FTK SNAP** and **Application Interview**.

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63. Activity header update: shortened headings

The SNAP activity descriptions in SPOS are shortened to avoid running past the space available on the SPOS screen headers. When the casehead name is too long (24 Characters) and the header information is overflowing into second line, new activity descriptions have been developed to resolve this issue.

Original activity description	New activity description
EC-SNAP Application Interview	EC-Application
SNAP Case Transfer	Case Transfer
ESNAP Issuance	ESNAP Decision
FTK SNAP Application Interview	FTK Application
SNAP Change Case Data	Change Case Data
EC-ESNAP Issuance	EC-ESNAP Decision
EC-SNAP Recert Interview	EC-Recertification
EC-FTK SNAP Application Interview	EC FTK Application
EC-SNAP Change Case Data	EC-Change Case Data
Approve SNAP Application Interview	Approve Application
SNAP Stop Adverse Action	Stop Adverse Action
SNAP Settle in Conference	Settle in Conference
SNAP Application Interview	Application Interview
Approve SNAP Case Transfer	Approve Case Transfer
Approve ESNAP Issuance	Approve ESNAP Decision
Approve EC-SNAP App Interview	Approve EC-Application

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SNAP Sep Det-Elig Decision	Separate Determination
Approve FTK SNAP Application Interview	Approve FTK Application
Approve SNAP Recert	Approve Recertification
Approve SNAP Change Case Data	Approve Change Case Data
SNAP Recertification Interview	Recertification Interview
EC-SNAP Sep Det-Elig Decision	EC-Separate Determination
Approve EC-FTK SNAP App Interview	Approve EC-FTK Application
Approve EC- SNAP Recert	Approve EC-Recertification

64. Review case: Audit - Limiting Time Frame of Review

The Auditor can use the **Review Case Information** to complete an Audit. An Auditor, enrolled in Auditor Role Title 27, can only view data for specific SPOS SNAP case numbers assigned by Department Social Services/Human Resources Administration (DSS/HRA) Staff. An Auditor can access only the **Review Case** screens in SPOS. The **Review Case** screen will display **Review Case Activity Data, Case Comment, Printed Form Data, Grant Request** and **Issuance Information** and **Indexed Document Information** for the assigned **SPOS SNAP Case**.

65. Review Case: Help Text for Activity History

- The Processor can view the Help Text by clicking the **Help icon** on the top of the **Activity History** screen to get assistance in using the screen.

Help text displays as follows: "The Reviewer Summary screen allows you to see the Processor or Supervisor Summary information, depending on the activity selected. "

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The Reviewer Summary screen allows you to see the Processor or Supervisor Summary information, depending on the activity selected

Activity Sequence No.	Activity Description	Activity Status	Worker's Name	WMS ID	Start Date	End Date
45	Review Case	COMPLETE	(F22)		7/30/2020 12:57:57 PM	7/30/2020 12:58:05 PM
44	SNAP Application Interview	COMPLETE	(F22)		7/30/2020 12:27:58 PM	7/30/2020 12:57:28 PM
43	SNAP Application Interview	COMPLETE	(F22)		7/30/2020 12:07:53 PM	7/30/2020 12:27:36 PM
42	SNAP Application Interview	COMPLETE	(F22)		7/30/2020 11:43:32 AM	7/30/2020 11:56:50 AM
41	SNAP Application Interview	COMPLETE	(F22)		7/30/2020 9:55:33 AM	7/30/2020 11:56:50 AM
40	SNAP Application Interview	COMPLETE	(F22)		7/30/2020 9:14:32 AM	7/30/2020 11:56:50 AM
39		IN PROGRESS	(F22)		7/30/2020 9:13:53 AM	
38		IN PROGRESS	(F22)		7/30/2020 9:13:53 AM	

Displaying Record(s) 1-15 of 44 Items Page 1 of 3

ARCHIVED DATA EXIT REV

66. Technology Update: WMS budget outside of Citrix

This technology update runs the budget from SPOS without opening the black WMS windows. This helps in processing the case without the need of legacy application.

- Workers click the **Calculate Budget** button on the **Budget** screen to get a *Please Wait* message. The Worker will then be able to see the progress bar with the time remaining for the running of the budget.



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67. Technology Update: Turn Off Activity Completion Edits

This technology update provides an effective way to turn on and off activity completion edits. The edits can be disabled in an expedited manner if required by business or by an emergency situation.

68. Technology Update: Access to Universal Indexing Tool in SPOS

- Workers can access the Universal Indexing Tool (UIT) / Centralized Web Indexing (CWI) from SPOS to access documents that were scanned and need to be indexed. The Universal Indexing Tool (UIT) / Centralized Web Indexing (CWI) is accessible from SPOS without needing to click on the PowerBuilder link. The Worker does not need to login separately into UIT/CWI to access. Session and activity remains active and open and the Worker can seamlessly return to the case to continue processing after indexing is completed.

69. Technology Update: For Overview Screen Move Other Applications Lookup to Nightly Process

All data for other applications is retrieved on a nightly process. It is readily available on the **Overview** screen for new applications submitted via Access HRA to optimize the retrieval time.