OFFICE OF POLICY, PROCEDURES, AND TRAINING
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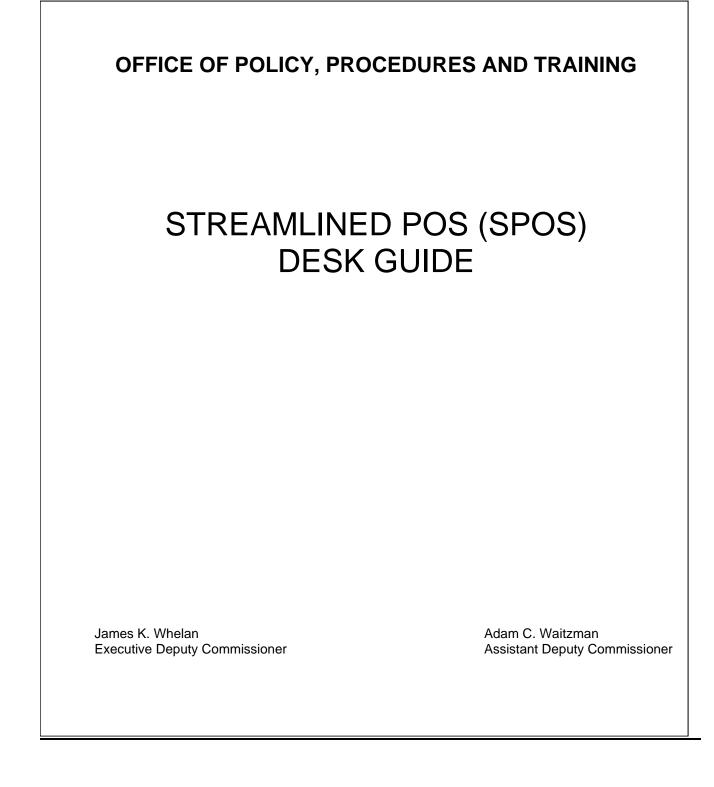Office of Procedures

POLICY BULLETIN #21-25-SYS

INTRODUCTION OF THE STREAMLINED POS (SPOS) DESK GUIDE

Date: April 22, 2021	**Subtopic(s):** SNAP, SPOS
	The purpose of this policy bulletin is to introduce a new Streamlined POS (SPOS) Desk Guide to assist SPOS users with commonly performed actions. The guide also provides tips on how to avoid certain common Welfare Management System (WMS) errors. The new SPOS Desk Guide is attached to this policy bulletin and is also available on eDocs by clicking this link SPOS Desk Guide. *Effective Immediately* **Attachment:** Streamlined POS (SPOS) Desk Guide

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

Distribution: X

Department of Social Services
Human Resources Administration
Department of Homeless Services

Family Independence
Administration

OFFICE OF POLICY, PROCEDURES AND TRAINING

STREAMLINED POS (SPOS)
DESK GUIDE

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SPOS Desk Guide

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Accessing your desktop

To access your desktop, press the windows key which will allow you to get to other applications by clicking the open application on the task bar or opening a new application via the programs menu.

Modifying/adding client data in the Household screen

- To add a social security number (SSN) to an existing case member on the Household screen – Click the row of the person to be updated on the top grid. Click the Edit Record button. When finished entering the SSN and selecting the SSN Validation status field as 1, click Save Changes and Next for the update to transmit to WMS. Updates must be done for one person at a time. If you need to update multiple people, go back to the Household screen and repeat this process for each person to be updated. **Do not attempt to update information for multiple people and transmit at once because WMS does not accept multiple modifications in a single Next click.**

- Updates to any other demographic data on an existing person stored in the Household screen such as name, date of birth, ethnicity can be done via the Household screen. Click the row of the person to be updated on the top grid. Click the Edit Record button. When finished making the updates on that person, click Save Changes and Next for the update to transmit to WMS. Updates must be done for one person at a time. If you need to update multiple people, go back to Household screen and repeat this process for each person to be updated. **Do not attempt to update information for multiple people and transmit at once because WMS does not accept multiple modifications in a single Next click.**

- If a person's line is Closed or Sanctioned on the case and they are going to be reactivated, ***Do not add another line of the same person, that would cause a duplicate line***. Reopen the existing line by making sure the Buys and Prepares Meals question is Yes on the Household screen. Review and edit details for that person on Individual Details, Individual Docs. Answer any other questions relevant to that person. On the TAD put that person's individual line status as AC with the appropriate status reason and update the From Date for that person.

- Adding a new person to the household – Click Add Member button. A blank member details section will appear. Enter all the information for that person. Click Save Changes and Next for the newly added person to transmit to WMS. If you need to add other people, go back to Household screen and repeat this process for each person to be added, one at a time. **Do not attempt to add multiple people and transmit at once because WMS does not accept multiple modifications in a single Next click.**

- **Reminder – any additions of new household members to the case will require a new budget to be calculated.**

Handling Deceased Individuals

To have SPOS recognize an individual as deceased, perform the following steps:

In editable interview mode, go to the Household section.

Change the relationship of the deceased person to Unknown and set Buys and Prepares Meals to No. Click Save Changes and click Next to transmit to WMS.

If the deceased individual was the casehead, assign the relationship Casehead to the appropriate individual on the Household screen. The Buys and Prepares Meals must be set to Yes for Casehead. Click Save Changes and click Next to transmit to WMS.

Go back to processor mode by clicking Back to Interview button.

On the TAD, if case is active, then close the individual's line with reason code Died – D00 or Died – E95. If case is in applying status, then reject the individual's line with E95. Reason code E95 can be used for rejections or closing of lines.

For more information on the handling of deceased lines, please see page 5 of policy directive PD #18-04-ELI.

Immigration flow

The immigration flow is triggered by answering No to the US Citizen/National question on the Individual Details section of Streamline POS.

In Application interview, the immigration flow opens with the 14 immigrant types displayed in the grid on the top of the page. The worker answers Yes to the appropriate immigration status based upon the documentation provided by the client. When Yes is answered to an immigration type, the details for that type opens such as alien number, date of status, and date physically entered the US. This information is obtained from the documents provided by the client.

For certain immigration statuses, there is another section called SNAP Eligibility Details that opens in the immigration flow if the date of status is less than 5 years. The immigration statuses which open other questions if the date of status is less than 5 years are Legal Permanent Resident, Battered, and Parolee At Least One Year. The other questions that can be used to determine the non-citizen to be eligible for SNAP are if they are serving in the military, if they are a veteran, if they are currently receiving SSI, if they have Other Disability (this opens a subset of further Other Disability questions), and the 40 quarters flow. **You must click Save Changes several times to ensure proper running of business rules and ensure the opening of more questions**. If the non-citizen is able to meet one of these categories, they will be eligible for SNAP benefits.

How to Add another non-citizen of the same immigrant type

Scenario – you have one Legal Permanent Resident (LPR) already saved in the immigration flow and need to add a second legal permanent resident.

To add a second LPR on this case, click on Legal Permanent Resident row again – this should enable the **Add Member** button. When you get the popup message warning you that any data entered will be lost if you do not click Save Changes, **Press OK to this message box**. After clicking OK, you will get a new blank record so you can select the second person who is an LPR from the household member dropdown and enter their details. **Click Save Changes button at the bottom of the page.**

You will now see 2 rows on the top grid with legal permanent resident; one for the first person who is a legal permanent resident and another row for the person you just saved.

In order to properly complete the immigration flow, all other immigration statuses must be answered No and the Summary row on the top grid must be clicked so that a SNAP eligibility outcome can be determined.

In Recertification or Change case data, the immigration flow will open in re-evaluation mode. In Re-evaluation mode, the grid displayed is each non-citizen and their current immigration information. Any non-citizen that has met a milestone or trigger will be preselected by the system for evaluation. Some examples of milestones/triggers are turning 18 years old, reaching 5 years in status. Newly added non-citizens are also pre-selected for evaluation. Click Evaluate Selected button to begin and the system will enter the normal mode of the immigration flow. In normal mode you will see the 14 immigration statuses on the grid at the top where selections can be made accordingly. A worker may manually select a non-citizen for evaluation if their immigration status has changed. To do this, check the Re-evaluate/Evaluate checkbox and then click the Evaluate Selected button   If nothing has changed, all immigration information must be reviewed for each non-citizen.

For information on requesting a SAVE (Systematic Alien Verification for Entitlements) clearance please see policy directive PD #18-09-SYS.

For further details on the immigration flow, please see the Streamline POS Non-citizen workflow release notes at PB #18-29-SYS.

Student Eligibility

For a client going to college, please ensure that the student status detail entry panel that appears on the right side is answered appropriately. A side panel opens asking for the school name, location, enrollment, and the student eligibility status field. In the student eligibility status dropdown, select the option that applies to the client. The selection made in the student eligibility status dropdown list will determine the student eligibility outcome on the Interview Summary.

Address Matches inside of SPOS

Please be advised that various income matches can appear in the Income Details section of SPOS. Clients may also report the same income as that found by a match. In order to avoid double counting income, remove the Client Reported row from Income Details. You must be in editable interview mode in order to address matches or remove any client reported income that is the same as income found in a match. The worker can dispute the match if amounts are not accurate or the job/income has ended, as described below. When disputing, a documentation option must also be selected for the dispute. If proof is present in the One viewer, select Document satisfies dispute.

Income Details: OCSE Child Support Income match

The OCSE Child Support income match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for child support income. Remove the Client Reported row and use the match.**

Streamline POS calculates the amount that should be budgeted.

Budget and dispute logic:

- Match data remains read only.
- Missing data must be entered by the Worker.
- Budgeting and averaging of income follow current procedure.
- Income is budgeted unless proper documentation is submitted.
- If successfully disputed, a data entry section opens, and the worker can enter an end date or update the income

Client Dispute options:

- Amounts are incorrect.
- No longer receiving payments,
- Match information is accurate.

In order to successfully dispute the match, there must be documentation to prove the dispute. To proceed, select either Amounts are incorrect OR No longer receiving payments, pick Document Satisfies Dispute for the Dispute Outcome so that the data entry fields will open for the worker to update the match.

Income Details: TALX match

The TALX match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for the same job. Remove the Client Reported row and use the match.**

When all data is present and the match is accurate, data from match is budgeted:

- For monthly income, first month of available income is budgeted.
- For bi-weekly and semi-monthly income, the average of two payments is budgeted.
- For weekly income, the average of four weeks is budgeted.
- If frequency is hourly, the pay dates are used to determine frequency.

Budget and dispute logic:

- If income is outdated, worker must dispute to prevent income from going to budget.
- Match data remains read only.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- Missing data must be entered by the Worker.
- Worker can defer for documentation.
-
- If successfully disputed, a data entry section opens, and the worker can enter an end date or update the income.

Client dispute options:

- Never Worked for this employer
- No longer working for this employer.
- Incorrect hours/salary
- Match information is accurate.

In order to successfully dispute the match, there must be documentation to prove the dispute. To proceed, select either "Incorrect hours/salary" if the applicant or participant is still working for that employer. If there is proof, and pick Document Satisfies Dispute for the Dispute Outcome so that the data entry fields will open for the worker to update the match. If No longer working for this employer, a job termination letter needs to be provided by the client.

Income Details: ACCIS childcare provider match

The ACCIS childcare provider match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for employment as a childcare provider. Remove the Client Reported row and use the match.**

The ACCIS match does not include days worked per week, hours worked per week, or income disregard info. IVS groups the information by provider. Information in Streamlined POS is by child as needed for the budget. Worker enters the childcare provider details.

Budget and dispute logic:

- Detail section opens even when match is accurate.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- Missing data must be entered by the Worker.
- Worker can defer for documentation.
- **In order to successfully dispute the match, there must be documentation to prove the dispute**

Income Details: FISA/NYC Employee match

The FISA match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for the same job. Remove the Client Reported row and use the match.**

The FISA match does not include hours worked, which are required for budgeting, employment code determination and ABAWD. Hours worked must be entered by the worker.

- Client dispute: Incorrect hours/salary
- Documentation: Worker selection
- Dispute outcome: Document satisfies dispute if document is present

Budget and dispute logic:

- If income is outdated, worker must dispute to prevent income from going to budget.
- Missing data must be entered by the Worker.
- Match data remains read only.
- If the worker does not enter hours worked, then error message appears in budget.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- Worker can defer for documentation.
- **In order to successfully dispute the match, there must be documentation to prove the dispute**

Income Details: Wage Reporting System (WRS) RFI match

The Wage Reporting System (WRS) match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for the same job. Remove the Client Reported row and use the match.**

Worker reviews the information shown in the match and selects Not disputing/new information to add the RFI to the case.

Worker can defer the income if the above option is selected or update the information/amounts in the match.

Worker must enter income as zero amount if the income should not appear in the budget. This is a worker determination.

In order to successfully dispute the match, there must be documentation to prove the dispute

Income Details: New Hire RFI match

The New Hire match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for the same job. Remove the Client Reported row and use the match.**

Worker reviews the information shown in the match and selects Not disputing/new information to add the RFI to the case.

Worker can defer the income if the above option is selected or update the information/amounts in the match.

Worker must enter income as zero amount if the income should not appear in the budget. This is a worker determination.

In order to successfully dispute the match, there must be documentation to prove the dispute

Income Details: Unemployment Insurance Benefits (UIB) RFI match

The Unemployment Insurance Benefits (UIB) match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for UIB. Remove the Client Reported row and use the match.**

Worker reviews the information shown in the match and selects Not disputing/new information to add the RFI to the case.

Worker can defer the income if the above option is selected or update the information/amounts in the match.

Worker must enter income as zero amount if the income should not appear in the budget. This is a worker determination.

In order to successfully dispute the match, there must be documentation to prove the dispute

Income Details: SDX match

The SDX match for Social Security Supplemental Income (SSI) income is brought in from the SDX Clearance system into Streamline POS Income Details section. **In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for SSI income. Remove the Client Reported row and use the match.**

If the match is disputed and documentation satisfies the dispute, the income from the match will not carry over to the budget. If documentation does not satisfy the dispute, the income will be budgeted.
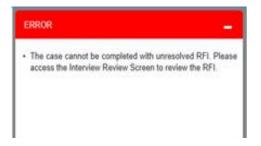
Client dispute options:

- Match information is accurate.
- Incorrect amounts
- No longer receiving benefits.
- Never received benefits.

Resolve RFI inside of SPOS
Do not resolve the RFIs in WMS directly.

In the Interview Review screen click the pencil icon on Income Details section to get into editable interview mode. When an RFI match appears in income details, users can dispute the RFI and also resolve the RFI match inside of SPOS by selecting a match resolution and an RFI resolution code from the dropdown. If an RFI Resolution Code is posted, clicking Next will transmit the resolution of the RFI to WMS.

If in Processor mode, and the RFI has not been addressed in the Income Details section, users have the opportunity to resolve RFI matches on the Processor Summary. On the Processor summary, select a resolution code from the dropdown list and click Post Resolution. Posting the resolution will transmit to WMS. Please resolve all RFIs inside of SPOS.

Note – if the RFI is resolved in WMS and not inside of SPOS users will get an error when trying to submit the case to the supervisor.

How to mark client as having a disability

Please be advised that a client receiving SSI or disability income *is not considered disabled for SNAP purposes* by virtue of receiving that income. In order to mark the client as disabled in order to populate the aged/disabled indicator in WMS and allow them to be eligible to claim medical expenses as deductions, you must answer Yes to Medical Info, click Add Medical Issue button, and answer the Daily activity limited question. In the details for this question be sure to select Disabled. In the medical reasons for ABAWD field, select an option from the choices displayed. When finished entering details, click Save Changes button and then Next. Once the Medical Info has been answered properly, the system will allow the claiming of medical expenses in the Other Expenses section and also mark the client as aged/disabled in WMS.

Reminders about SNAP Employability Code and ABAWD indicator

Please remember that the SNAP Employability Code and ABAWD indicator is determined purely by the data supplied on the case.

- For a case where there are children under 6, do the following to ensure that the proper employability code and ABAWD indicator (employability code 29 with ABAWD indicator N) is returned. In the Alerts section answer Yes, do Add Alert, and select Is needed to care for a child under six, to answer that question. Save Changes and click Next. In the Individual Details section, the adult needs to be selected as the parent of the child's line in Individual details. Once all this has been done, go to the Interview summary to refresh the SNAP Employability and ABAWD section

- If the client has medical issues or has a disability, ensure that Medical Info section is answered Yes, then click Add Medical Issue, and select Daily Activity Limited. Fill out all the details in this question selecting the appropriate choice for Daily activity limited due to, and in the Medical Reasons for ABAWD field select the appropriate choice for the client's circumstances. Click Save Changes on the bottom of the page. Then go to Interview Summary – the business rules will run and the SNAP employability code & ABAWD information will be updated.

How to Withdraw an Application

- **Do Not Click Request to Withdraw Case on the Tools menu**
- Go to the TAD screen. On the TAD, select Rejected-Other for the SNAP Case Status.
- In the Case Status Reason field, choose reason code M91 Client Request, Phone OR use M90- Client Request Written or Face to face
- You cannot use code Y94 to withdraw cases during the Covid-19 period.
- As a reminder, once the case is rejected with M90 or M91, it is considered a withdrawal. The client must apply again if they change their mind. The action cannot be reverted in SPOS.

Household member lines are not showing in SPOS TAD but exist in WMS

If staff runs into the situation where lines are not showing up in the TAD but they exist in WMS, please contact the POS Helpdesk and ask them to force a synchronization on the case.

How to Reopen a case

When reopening a case, make sure the case meets the criteria for a reop. You must use the Recertification Activity if the closing was a recertification closing, otherwise use the Change Case Data Activity.

- First go to the TAD, change the suffix level status from CL to AC and select the appropriate case reason opening code and update the date field with the date of compliance.
- Reopen individual line(s) as needed, with individual reason codes LL or LZ and update the date field to match the new suffix date. **Note: make sure the lines that are not being reopened stay in their original status.**
- Access the budget screen and initiate a new budget.
- After the budget has successfully ran, return to the TAD and select the new budget number from the dropdown list in the WMS Budget Number field.
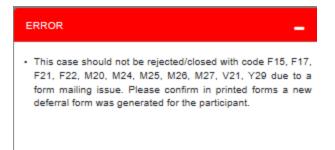- Create CNS notice if required.

Reminders about CNS Notice creation

- If accepting cases with opening codes that start with "Q and A" a CNS notice is required.
- If accepting all individuals, you MUST use the Create CNS Notice button
- If there are any individuals that will not be activated on that case, you must create a manual CNS notice in WMS directly. Once the notice is created you must copy the notice number and paste it in the CNS Notice # field on the TAD.
- If using codes that do not start with Q or A you must create the CNS notice in WMS and use the Retrieve Notice button to pull the notice number into the CNS Notice# field on the TAD.
- If using a code that starts with Y, a manual notice must be created.

V21 error on TAD due to mailing form issues

During the timeframe of February 19, 2021 through March 4. 2021 ITS experienced issues mailing out deferral forms to clients via print to mail. As a result of this print to mail problem, ITS prevented workers from closing or rejecting affected cases until after March 31, 2021 – for details see Fax Flash 21-07 Fax Flash 21-07

The affected cases displayed an error message on the TAD that looked like this:

ERROR   −

- This case should not be rejected/closed with code F15, F17, F21, F22, M20, M24, M25, M26, M27, V21, Y29 due to a form mailing issue. Please confirm in printed forms a new deferral form was generated for the participant.

In order to perform a rejection on an application case with V21, please try changing the From Date on the case level (in the Household Detail) part of the TAD to today's date and click Save Changes on the TAD.

Please be advised that if *__another__* FIA-1146 form was generated again by a worker after ITS did the mailings of the forms, you must wait until the due date of the latest FIA-1146 form expires before you can do the rejection.

In order to close a case with V21 change the To Date on the case level (in the Household Detail) part of the TAD to today's date and click Save Changes on the TAD.

Please be advised that if *__another__* FIA-1146 form was generated again by a worker after ITS did the mailings of the forms, you must wait until the due date of the latest FIA-1146 form expires before you can do the closing.

Use of W-132S form
The W-132S should only be used for deferrals in SNAP Change Case Data activity.

- Ensure that the eligibility factors for which you are deferring are marked "Document Pending" or Insufficient if in Existing documents, so that the form populates correctly.
- The form will not be printed and mailed out to clients if there are no pending or insufficient eligibility factors.
- The Due Date is system populated. As a reminder, the Edit button on the data entry window for the W-132S is so workers can edit the due date to another date in the future.

Waiver for missing client signature
Please be advised that per Center Directive CD #21-01, during the Covid-19 crisis a SNAP client can verbally attest to signing the LDSS-4826 or LDSS-5166.   After speaking to the client, worker must enter a case comment stating the date and time the verbal attestation of signature was given by the client. For more information please see CD 21-01.

Use of Verification Widget

Processors may see warnings on the case informing them to check/review documentation in the verification widget, which was introduced in Streamline POS version 3.2.

The **Verification Widget** allows the processor to view documents received after an interview or since the case was last accessed in POS. The widget appears on the right-hand side of the **Interview Review** screen.

The widget includes 4 tabs:
- **For Review:** New eligibility documents received and their associated eligibility factors.
- **Missing:** Eligibility factors with missing or incomplete verification.
- **Other Docs:** Packets from housing requests and other case actions.
- **Reviewed**: Eligibility factors reviewed in prior actions.

This section is intended to help guide staff on how to use the verification widget to check for newly submitted documents on the **For Review tab.**

The **For Review** tab presents new eligibility documents received and their associated eligibility factors. The processor clicks on the green link inside the Verification widget to open the submitted document. The processor has access to the editable interview areas by clicking on the **Edit Pencil** icon. The widget automatically pairs eligibility documents to eligibility factors and questions wherever possible.

These documents are presented with the matched eligibility factors with **Accept (checkmark icon)** and **Reject (X icon)** buttons:

- If the processor selects **Accept**, the eligibility factor is marked as Complete.
- If the processor selects **Reject**, the eligibility factor is marked as Insufficient.

The document(s) cannot be automatically paired when:

- The question does not have an answer of **Yes.**
- The same eligibility factor is selected twice for an individual (i.e. one person with two jobs).

When the widget cannot pair the document with an eligibility factor, the document is displayed with the name of the individual for whom the document was received, the eligibility factor for which it is acceptable, and a mandatory/optional indicator.

When a document is received and cannot be paired for eligibility factors with missing verification, the missing eligibility factors are displayed below the new document to allow easy selection by the processor or a selection that the document is not relevant.

For SPOS 4.1 users, a new pop-up window with the reasons for the rejection of a document appear. The worker must select one or more reasons for the rejection of a document.

In SPOS 4.1, 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**.

To all users, for more details on how to use the remaining tabs of the Verification widget, please see the Streamline POS 3.2 release notes in PB #19-30-SYS.

For SPOS 4.1 users only, please see the Streamline POS 4.1 release notes for other updates made to the Verification widget (PB #21-16-SYS)

Requesting a new clearance on a case

For Streamline POS users still on version 3.3, users can run a new clearance on a case by accessing the CIN ReUse/Case ReUse activity on the Classic POS action tab. Once the new clearance is generated, then launch the case in SPOS. **Please be advised that requesting a new clearance requires a new budget to be calculated in SPOS. The new budget number must be selected on the TAD as well**.

Starting with Streamline POS release 4.1, in processor mode, the CIN ReUse window is available on the Tools menu under WMS. In Streamline POS release 4.2 the CIN ReUse window is available on the Tools menu under WMS in the interviewer role. In the CIN ReUse window, click Request New Clearance button. **Reminder – if a new clearance is requested, the worker must calculate a new budget and select the new budget number on the TAD.**

How to Process an Ineligible ESNAP determination

Flow for Ineligible ESNAP (other than financially ineligible ESNAP cases) - If a case is found ineligible for ESNAP for a reason other than financial, at the top of the ESNAP eligibility screen, **do not** click Next. Use the navigation bar to get to Processor Summary and send the case to a supervisor for approval. If you do not need to touch any other screens, go directly to Processor Summary.

Financially ineligible cases

On the budget screen, if an application case is ineligible due to excess income or failing the gross income test, the case needs to be rejected on the TAD as well. On the TAD screen select the Case Status as Rejected-Financial, select the appropriate reason code. On the WMS budget# field, select the ineligible budget.

Tips for avoiding budget processing issues

- Ensure standalone WMS is closed and not running in the background on your desktop
- While a budget is running, do not click anything, even if it freezes.
- If it freezes, click the Windows icon to open the applications windows to grab a screenshot and email us.
- If the budget makes a mistake - let it run and attempt to calculate a new budget.
- If those do not apply, please suspend then go back into the case to try again.
- If the budget does not make a mistake - do not attempt to save by clicking or typing "Y" - this is saved automatically in SPOS.
- If all else fails, use this link to open a ticket. Paste all screenshots, including the help about screen from the SPOS tools menu. https://bit.ly/2Vhy1P9

Tips for 500 Internal server error

If you experience a 500 Internal server error, please try the following:

- Navigate to a prior screen and then come back to the screen giving the error.
- If that does not work, please try suspending the case and coming back into it.
- If neither of these suggestions work, please create an incident ticket – include a screenshot of the error, and the help about screen from the SPOS Tools menu https://bit.ly/2Vhy1P9

Avoiding WMS error E1565

When creating a CNS notice in WMS, it is best practice to copy and paste the notice number on the SPOS TAD, because when typing the CNS notice number letter O might be mistaken for 0 zero causing the case to error in WMS **E1565 TAD NOTICE NUMBER NOT IN CNS**.

Avoiding WMS error E1562

Supervisors, when approving case actions that require CNS notices please review details of the CNS notice in WMS for accuracy to avoid WMS error **E1562 TAD CODE AND NOTICE CODE DO NOT MATCH**

Avoiding WMS error E0427

For eligibility specialists, when adding individuals to an Active case, you must make a determination for this individual before submitting the case for supervisory approval

- Access the TAD from the navigation bar, select status and reason and enter date of action on the individual line(s) that were added.
- Access the budget and run a new budget. Once completed, the new budget number will be available in the TAD for selection. Proceed as usual, failure to do so will cause case to error in WMS with **E0427 IND STAT CHNG INCOMP WITH EXISTING STAT**

For Supervisors when signing off on actions on active cases, ensure newly added lines have a determination made before signing off on the case, failure to so will cause case to error in WMS with **E0427 IND STAT CHNG INCOMP WITH EXISTING STAT**

Error Correction for WMS error E2785

For cases which have errored in WMS with error **E2785 HBE Data Not Available**, please ensure a new clearance is initiated on the case using the SPOS Tools menu.

For Streamline POS users still on version 3.3, users can run a new clearance on a case by accessing the CIN ReUse/Case ReUse activity on the Classic POS action tab. Once the new clearance is generated, then launch the case in SPOS. **Please be advised that requesting a new clearance requires a new budget to be calculated in SPOS. The new budget number must be selected on the TAD as well**.

Starting with Streamline POS release 4.1, in processor mode, the CIN ReUse window is available on the Tools menu under WMS. In Streamline POS release 4.2 the CIN ReUse window is available on the Tools menu under WMS in the interviewer role. In the CIN ReUse window, click Request New Clearance button. **Reminder – if a new clearance is requested, the worker must calculate a new budget and select the new budget number on the TAD.**

WMS errors E0250 and E0540 require case to be re-budgeted

These errors are occurring due to mass rebudgeting that was done in February 2021 in WMS. In an error correction action on a case that has errored out in WMS with these 2 errors **E0250 DATE INVALID** and **E0540 PFP BUDGET RESULTS DO NOT MATCH**, please calculate a new budget on the case and use that new budget number on the TAD.