NEW YORK STATE
OFFICE OF TEMPORARY AND DISABILITY
ASSISTANCE
40 NORTH PEARL STREET
ALBANY, NY 12243-0001

Administrative Directive

Section 1

Transmittal:	08-ADM-06
To:	Local District Commissioners
Issuing Division/Office:	Budget, Finance, & Data Management and Center for Employment and Economic Supports (CEES)
Date:	September 22, 2008
Subject:	Social Security Administration Automation of Interim Assistance Reimbursement (IAR), Direct Deposit Authorization for IAR Payments, Government to Government Services Online (GSO) Registration, and "Monthly IAR E-Report" Database Creation
Suggested Distribution	Accounting Supervisors Child Assistance Program Coordinators Employment Coordinators Fair Hearing Officers Food Stamp Directors Medical Assistance Directors Staff Development Coordinators Temporary Assistance Directors TOP Coordinators
Contact Person(s):	Any program questions should be directed to: CEES Bureau of Temporary Assistance at (518) 474-9344 Any legal questions should be directed to: Kerry Delaney (518) 473-3271 Kerry.Delaney@otda.state.ny.us. Any fiscal questions should be directed to: Regions 1-4: James Carroll 1-800-343-8859, ext. 4-7549 or (518) 474-7549 James.Carroll@otda.state.ny.us. Region 5: Michael Borenstein (631) 854-9704 Michael.Borenstein@otda.state.ny.us. Region 6: Marian Borenstein (212) 961-8250 Marian.Borenstein@otda.state.ny.us. Any CentraPort questions should be directed to: Janet Krak (518) 473-9779 Janet.Krak@otda.state.ny.us. Any ListServe questions should be directed to : Office for Technology Customer Relations Helpdesk 1-866-789-4638.

Attachments:	Attachment A: Certificate of Authority
	Attachment B: Direct Deposit Information
	Attachment C: GSO Electronic IAR Website Registration Form
	Attachment D: ListServe
	Attachment E: E-Reporting Form
	Attachment F: Action List
	Attachment G: CentraPort Fact Sheet
Attachment Available On – Line:	Yes

Filing References

Previous ADMs/INFs	Releases Cancelled	Dept. Regs.	Soc. Serv. Law & Other Legal Ref.	Manual Ref.	Misc. Ref.
08 ADM-05 99 ADM-07 94 ADM-01 93 INF-12 89 ADM-02 88 LCM-16		Part 353		TA Source Book Chapter 9, Section O Chapter 10, Section M	

Section 2

I. **Summary**

This Administrative Directive (ADM) provides information to the Local Social Services Districts (LSSDs) regarding a future change in policy by the Social Security Administration (SSA) to direct deposit Interim Assistance Reimbursement (IAR) payments, and future changes in the Center for Employment and Economic Supports' (CEES) procedure for reporting submitted SSA-8125s on a monthly basis. **Attachments A, B, C, D, & E must be sent no later than September 25th, 2008, to their respective locations.**

II. **Purpose**

The purpose of this directive is to inform Local Social Services Districts (LSSDs) that the SSA is automating the current IAR paper check process with the use of a secure website. LSSDs will be required to communicate to the SSA the amount of Interim Assistance (IA) paid via an SSA secure website and any IAR payments will be direct deposited by the SSA into a district designated bank account via the Automated Clearing House (ACH) process. The SSA will also be automating the current mailed notices process with a comprehensive e-mail alert system.

To facilitate the institution of the automated process, LSSDs must supply the SSA and/or the Office of Temporary and Disability Assistance (OTDA) with the Certificate of Authority, Direct Deposit Information, Government to Government Services Online (GSO) e-IAR Website Registration, ListServe, and E-Reporting Forms based upon the

directions given in this Administrative Directive. These forms are found in Attachments A, B, C, D, and E respectively.

It is imperative that all LSSDs complete the attached forms and return them by their designated deadlines. Once the SSA initiates its operation of the automated system, LSSDs will no longer receive paper checks. **A LSSD that does not complete the required forms and return them before the SSA implements its new policy will not receive its portion of the IAR payment.** Instead, the SSA will transmit the entire IAR amount directly to the Temporary Assistance (TA) recipient in accordance with its regulations.

III. Background

Section 1631 (g) of the Social Security Act provides that the State and the SSA may enter into an agreement wherein the SSA transmits the IAR payment directly to the LSSD.

Since 1974, OTDA has had an agreement in effect with the SSA that identifies the conditions and responsibilities which must be followed to allow the SSA to withhold a Supplemental Security Income (SSI) recipient's initial or post eligibility SSI payment, and forward it to an LSSD as reimbursement for IA. Due to the transition to an automated process, the SSA and the OTDA are currently reviewing the agreement to determine if amendments are necessary.

Under the current process, once an individual who is in receipt of TA is determined eligible to receive SSI, the SSA notifies the LSSD of the individual's initial or post eligibility retroactive SSI amount and the date of eligibility for SSI. The LSSD then informs the SSA of the amount of IA paid to the SNA recipient during the pendency of the SSI application, by manually completing SSA form, SSA-8125 "Supplemental Security Income - Notice of Interim Assistance Reimbursement (SSA-8125)." This form is then either mailed or faxed to the local SSA field office. The SSA processes the information and either mails a check to the district representing the SSI recipient's entire retroactive amount or mails a check to the LSSD that represents the amount of IAR due to that district. In addition, the LSSD is required to complete form OTDA-3073 "Transmittal of SSA-8125s" and batch and mail supporting SSA-8125s to the Center for Employment and Economic Supports (CEES) monthly.

IV. Program Implications

Electronic IAR (e-IAR) is a new project being designed, implemented and mandated by the SSA to automate the current IAR paper check process. LSSDs must continue the current IAR processes until the e-IAR process is operational. Once the e-IAR process is operational, LSSDs will not have the option of continuing the paper check process.

Once the e-IAR system is implemented, the SSA will notify a LSSD that a TA recipient is eligible to receive SSI by sending an e-mail alert message to designated LSSD staff. Within ten working days of receiving the alert, authorized LSSD staff must access CentraPort to log onto the SSA's secure website with a SSA-issued Personal

Identification Number (PIN), Password, and State Data Exchange (SDX) Grant Reimbursement (GR) Code. The LSSD will then have to insert the required IA data on the appropriate screen. This data is expected to be similar to the data that is currently used to complete the "State's Account of Reimbursement Claimed" section of the paper SSA-8125.

If the LSSD fails to access the SSA's secure website and transmit the required IA data within the ten-day period following the initial notification, the LSSD will have an additional fifteen working days to complete the required information.

Note: LSSDs are currently required to comply within these timeframes under the installment method.

If the LSSD fails to access the SSA secure website and transmit the required IA data within twenty-five working days of notification of recipient eligibility by the SSA, the SSA will divert the entire IAR payment to the recipient in accordance with its own regulations. If this occurs, the LSSD can seek reimbursement of the IAR provided from the individual.

Please note that LSSDs will have until the close of business for each given work day to review and approve/cancel the submission of e-IAR payment data. This is due to the fact that the data run that distributes this information to the SSA will be performed at approximately 10:00 P.M., and once the run is started, LSSDs will not be able to cancel the submission of the information.

Once the SSA receives the required IA data, it will calculate the amount due to the LSSD. The SSA will then direct deposit the amount due into an account designated by each LSSD on the Direct Deposit Information form (Attachment B). A separate deposit will be made for each TA recipient. LSSDs are encouraged to have an account specifically designated for the IAR payments.

Within two days of the deposit, the SSA will send an e-mail alert to up to three contacts that the LSSD has authorized on the Certification of Authority. The LSSD will then be able to log onto the secure website via CentraPort to obtain the deposit information which will include the name and the Social Security Number (SSN) of the TA recipient. The LSSD will also be able to access additional information regarding deposits on the website, and review any outstanding or paid cases.

The SSA will also use the e-mail alert message system to replace the current mailed SSA notice system to notify LSSDs of other case specific information that must be reviewed. LSSDs must access the secure website to determine if any action is necessary.

LSSDs are reminded of the obligation to maintain accurate accounting records for each recipient. These records must be available for future fair hearings or audits performed by the OTDA and the SSA, and must be retained for six years and include a minimum of all of the following information:

- Date IAR received from SSA.

- The amount of IAR received from the SSA.

- The amount of IA paid to the individual.

Once the automated system is operational, LSSDs will no longer be required to:

- Receive a TA recipient's entire initial or post eligibility payment by check, calculate and retain the IAR amount, and disburse any remaining balance to the TA recipient within ten days of receiving the individual's initial direct SSI check from the SSA.

- Complete and submit the OTDA – 3073 "Transmittal of SSA-8125s" to CEES on a monthly basis.

- Batch and mail completed SSA-8125s to CEES.

LSSDs will, however, be required to electronically submit statistical IA data to CEES by accessing the e-Reporting link via CentraPort and completing the "Monthly IAR E-Report." Additional instructions will be sent in another ADM.

At a later date, the LDSS-2425 "Repayment of Interim Assistance Notice" (Upstate) and W128HH "Repayment of Interim Assistance Notice" (NYC) will be revised to reflect the changes in procedure. Additional instructions will be sent in another ADM at a later date.

The new e-IAR project is expected to be completed in three phases:

- Phase I – July-August 2008 – Regional SSA office representatives will contact state counterparts to obtain certificates of authority to verify agency contact information and develop direct deposit information.

- Phase II – September 2008 – Regional SSA office representatives will send model IAR agreements to district IAR agencies. During this time, they will also coordinate conference calls and NetMeetings to train district employees on the new software, and procedures.

- Phase III – TBD – Regional SSA office representatives will assist with district implementation.

V. **Required Action**

LSSDs must complete the attached forms with the assistance of the checklist provided (Attachment F), and send them to their respective locations no later than **September 25th, 2008**:

- Attachments A and B should be mailed to the following address:

Justin Gross
New York State
Office of Temporary and Disability Assistance
40 North Pearl Street, 14th floor section C
Albany, New York 12243-0001

- Each Attachment C should be e-mailed to the following address: ny.eiar@ssa.gov.

- Attachments D and E should be e-mailed to the following address: Pam.Pomiber2@otda.state.ny.us.

Forms to be completed are as follows:

A.   Certificate of Authority

The Certificate of Authority (Attachment A) certifies that the individuals listed on the first page are authorized to submit the required IA data via the SSA secure website. All of the individuals listed on this attachment must have a corresponding GSO e-IAR Website Registration Form completed for him/her.

The SSA will use up to three e-mail addresses provided under the "Agency Contact Information" section to notify LSSDs when required IA data must be transmitted to the SSA, and when deposits have been made. To accommodate LSSDs that need more than three e-mail addresses, OFT will establish a ListServe e-mail distribution list where e-mail messages can be sent to a single address and the message will be sent to all e-mail addresses that are listed in the database file of the ListServe. Since a ListServe is being utilized, one of the LSSDs three e-mail addresses will be: OTDA.dl.eIar.(county name). LSSDs can choose two additional e-mail addresses if needed. For more information on the ListServe see section D below.

Future changes to the Certificate of Authority will require that LSSDs complete a new Certificate of Authority and submit it to:

Social Security Administration
Center for Programs Support
26 Federal Plaza, Room 4060
New York, New York 10278
ATT: Naomi Diamond

Please remember that changes to the members listed as requiring PINs and passwords on this form will require a corresponding GSO e-IAR Website Registration Form completed as well.

B.   Direct Deposit Information

The Direct Deposit Information form (Attachment B) provides the necessary direct deposit information to the SSA so they will be able to implement the e-IAR process. For strong internal controls and ease of management, LSSDs are encouraged to have an account specifically designated for the IAR payments.

The SSA will set up a "pre-notification/zero dollar transaction" test process before the implementation of Phase II to successfully run all the direct deposit data. This process will allow for a maximum of security and error detection. If any portion of the testing is unsuccessful, LSSDs must work diligently with the OTDA and the SSA to resolve any issues.

Future changes to any direct deposit information listed in the Direct Deposit Information form will require that LSSDs complete a new Direct Deposit Information form and submit it to:

> Social Security Administration
> Center for Programs Support
> 26 Federal Plaza, Room 4060
> New York, New York 10278
> ATT: Naomi Diamond

If any of these changes are to the bank routing number or account number, the SSA will perform an additional "pre-notification/zero dollar transaction" test whereby the previous information is still utilized for IAR payments during a ten day testing period for the new information.

C.   GSO e-IAR Website Registration Form

The GSO e-IAR Website Registration Form, found in Attachment C, will be used by SSA to establish user PINs and Passwords. Users must have a PIN and Password to access the SSA's secure website. LSSDs must complete the left portion of a separate website registration form for each individual requiring access to the website. Each individual listed in the Certificate of Authority form must have a completed GSO e-IAR form, otherwise a PIN and Password will not be provided and those individuals will not have access to the SSA secure website.

Future changes to individuals requiring access to the SSA secure website will require that LDSS complete a new GSO e-IAR Website Registration Form for each person and e-mail them to Naomi Diamond of the SSA at Naomi.Diamond@ssa.gov. Please remember that a new Certificate of Authority will need to be completed in conjunction with the GSO e-IAR Website Registration Form and mailed to the SSA.

D.   ListServe

The ListServe will allow the OFT to create an automated e-mail distribution list for the alert e-mails sent by the SSA.

Future changes to the ListServe should be handled by the list administrator designated by each LSSD on this attachment.

E.   E-Reporting Form

The e-Reporting Form will be used to establish a database for the "Monthly IAR E-Reports" submitted to CEES.

Changes to the e-Reporting form should be brought to the attention of Royal Smith at (518) 473-6114 or Royal.Smith@otda.state.ny.us.

VI.   System Information

A.   CentraPort

CentraPort is a gateway to the Internet and State Intranet for LSSDs, and provides access to a collection of information and computer applications on a single summary screen. This is available from the New York State Human Services (NYSHS) Intranet, and is a browser-based application. This means that it functions just like any other internet webpage.

Prior to the implementation of the automated e-IAR process, individuals requiring access to CentraPort should contact their local systems administrator. To access CentraPort, users must also have a user id and password.

Once the new e-IAR process is in place, LSSDs will access the SSA secure website using the "Links" section of CentraPort found on the left hand side of the screen. From the "Links" section LSSDs will click on "Applications" and select the "e-IAR" link. By clicking on the link, LSSDs will be directed to the SSA secure website.

The URL to access CentraPort is: https://otda.state.nyenet/centraport/.

For questions concerning CentraPort including system requirements see Attachment G (CentraPort Fact Sheet) or contact Janet Krak at (518) 473-9779 or Janet.Krak@otda.state.ny.us.

B.   ListServe

The SSA's e-IAR automated system can only accommodate three e-mail addresses. To accommodate LSSDs that might need to have the e-IAR information distributed to more than three e-mail addresses, OFT is developing a ListServe.

A ListServe is an automated e-mail system where messages can be sent to a single address and the message will be distributed to all of the e-mail addresses that are listed in the ListServe file. Since a ListServe is being utilized, one of the LSSDs three e-mail addresses included on the Certificate of Authority must be: OTDA.dl.eIar.(county name).

To develop the e-IAR ListServe file, each LSSD must provide CEES with the names and e-mail addresses of the individuals who will be included in the list. One person should be identified as the list administrator. This individual must be in the State Outlook e-mail system, and will be in charge of updating member changes to the list. Instructions for maintaining the list will be distributed by the OFT at a later date. The remaining individuals are the initial members of the list.

C.   E-Reporting

Effective with the implementation of this new process, LSSDs will no longer be required to complete and submit the OTDA – 3073 "Transmittal of SSA-8125s" to CEES monthly. Instead, LSSDs will need to electronically submit statistical interim assistance data monthly by accessing the "Monthly IAR e-Report" which will be found in the eReorting link on CentraPort. Additional instructions will be sent in another ADM at a later date.

VII.   Additional Information

In anticipation of continuing questions and issues related to the implementation of the e-IAR project and the required district action, the CEES has scheduled two conference calls that will provide technical assistance to LSSDs. Representatives from OTDA's TA Program, Finance, Legal, and Systems will be present for questions related to the implementation of the new e-IAR process.

The call-in schedule and directions are as follows:

- Date: September 18th, 2008

- Time: Group One – 10:00am to 11:30am, Group Two – 1:00pm to 2:30pm

- **Group One:** Broome, Cattaraugus, Chautauqua, Clinton, Essex, Franklin, Hamilton, Herkimer, Jefferson, Lewis, Livingston, Monroe, Niagara, Oneida, Onondaga, Orleans, Otsego, Putnam, Rensselaer, Rockland, St. Lawrence, Schenectady, Schoharie, Schuyler, Seneca, Steuben, Tioga, Ulster, and Warren (29 LSSDs)

- **Group Two:** Albany, Allegany, Cayuga, Chemung, Chenango, Columbia, Cortland, Delaware, Dutchess, Erie, Fulton, Genesee, Greene, Madison, Montgomery, Nassau, New York City, Ontario, Orange, Oswego, Saratoga, Suffolk, Sullivan, Tompkins, Washington, Wayne, Westchester, Wyoming and Yates (29 LSSDs)

- Each district can join in the conference at their respective date and times listed above.

- Call toll-free: **1-877-985-3373** - You will hear a welcome from OFT and will be asked to enter your numeric participant passcode followed by the # sign. The passcode is **4700378** for both groups.

Note: Due to call-in limitations, please only have <u>one phone call per district location</u> (a speaker phone may be used for multiple district participants at the same location.) NYC is limited to seven different lines.

Issued By

Name: **Michael Normile**
Title: **Director**
Division/Office: **Office of Budget, Finance and Data Management**

Name: **Russell Sykes**
Title: **Deputy Commissioner**
Division/Office: **Center for Employment and Economic Supports**

Certificate of Authority
Interim Assistance Reimbursement (IAR)

_____

Name of Agency

I certify that the following incumbents of the Agency are authorized to sign documents reporting the receipt and disbursement of Interim Assistance Reimbursement received, in accordance with the Supplemental Security Income Agreement between the State of New York and the Commissioner for the Social Security Administration (SSA):

Insert the name and Job title for each of the individual's in your agency that need a Social Security Administration (SSA) Personal Identification Number (PIN) and password to access the SSA secure e-IAR website.

Districts can have as many PINs and passwords as needed. **A PIN and password will not be given to anyone who is not listed on this form. Also, a GSO e-IAR Website Registration From must be completed for each individual that needs a PIN and password.**

Name   _____

Job Title   _____

Name   _____

Job Title   _____

Name   _____

Job Title   _____

Name   _____

Job Title   _____

Name   _____

Job Title   _____

Name   _____

Job Title   _____

Name   _____

Job Title   _____

Certificate of Authority

Interim Assistance Reimbursement (IAR)

_____

Name of Agency

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Name _____

Job Title _____

Attachment A
Certificate of Authority
Interim Assistance Reimbursement (IAR)

Agency Identifying Information

GR Code

Agency Name

Mailing Address

City

State   N.Y.

Zip Code

Agency Name in Notices to Claimant

Agency Contact Information

Only one email address is needed but a district can have up to three email addresses.

Email Address #1   OTDA.dl.eIAR.

Email Address #2

Email Address #3

Contact Person's Name

Job Title

Telephone Number

Certifying Official Signature   **Date**

Title

Attachment B
Information Direct Deposit
Interim Assistance Reimbursement (IAR)

_____

Name of Agency

This letter is an authorization for the Social Security Administration's (SSA's) financial institution to credit our Agency's account listed below for Interim Assistance Reimbursement via ACH.

Direct Deposit Routing Number   _____

Direct Deposit Account Type (checking/saving) _____

Direct Deposit Account Number   _____

Bank Contact Name   _____

Bank Contact Phone Number   _____

_____

Certifying Official Signature   **Date**

Title   _____

Attachment C

GSO e-IAR Website Registration Form

Complete the following information to obtain access to Government to Government Services Online. Sponsors should email the completed form to **UIT.eData.Mailbox@ssa.gov**. Each new user will receive an email containing the Username and a phone call to provide the password.
Please *tab* from field to field.

USER CONTACT INFORMATION			SPONSOR VERIFICATION (For completion by Sponsor only):	
Name:			**Sponsor Name:**	**Phone:** (Include area code)
Organization Name:			**Sponsor Comments:**	
GR Code:				
Street Address (Line 1):				
Street Address (Line 2):				
City:	**State:**	**Zip Code:**	NOTE: The Sponsor is the IAR Coordinator for the region.	
Email Address:				
Phone (Include area code):				

ListServe
Interim Assistance Reimbursement (IAR)

_____

       Name of Agency

The information provided below is for the individual responsible for maintaining the list server (List Administrator). This individual must be located in the State's Global Address List in Outlook.

Name	
Email Address	
Telephone Number	

List the members of the list. These are the individuals who should receive the SSA e-mail alerts. This portion is for individuals on the State's Global Address List in Outlook.

Name	
Email Address	
Telephone Number	
HSEN User ID	

Name	
Email Address	
Telephone Number	
HSEN User ID	

Name	
Email Address	
Telephone Number	
HSEN User ID	

Name	
Email Address	
Telephone Number	
HSEN User ID	

Attachment D
ListServe
Interim Assistance Reimbursement (IAR)

If SSDs need the e-IAR information to be sent to individuals who have an external email address (not in Outlook) this information must be added at the inception of the list. The information provided below is for external email addresses.

Name _____

Email Address _____

Name _____

Email Address _____

Name _____

Email Address _____

Attachment E
E-Reporting Form
Interim Assistance Reimbursement (IAR)

The information provided below is for the individual who will be responsible to do the monthly reporting to OTDA/CEES

Name _____

Email Address _____

Telephone Number _____

Fax Number _____

Action List
Interim Assistance Reimbursement (IAR)

Certificate of Authority
(Attachment A)

- o Identify who will need a SSA PIN and Password. These individuals must be listed on the form by Name and Job Title. If additional spaces are needed, either add them to the word file itself or copy the second page as needed.

- o Complete Agency Contact Information.

- o Identify who will receive "alert" e-mails. The SSA automated system can only support three e-mail addresses per agency, so OFT is creating a ListServe for each SSD, and the e-mail address follows the template: OTDA.dl.eIAR.(district name). This address should be listed as one of the three available e-mail addresses. It is essential that e-mail addresses listed are maintained and accessed.

- o Place the Certificate of Authority form on an Agency Letterhead.

- o Sign form – The Certificate of Authority must be signed by an official of the Agency. An official is an individual who represents and speaks for the Agency. An official is an Agency Director, Assistant Director, or other individuals who speak for the Agency or who are authorized to sign for the Director.

- o Mail the completed and signed form along with the Direct Deposit Information to:
    Justin Gross
    New York State
    Office of Temporary and Disability Assistance
    40 North Pearl Street, 14th floor section C
    Albany, New York 12243-0001

Note: It is essential that SSDs be diligent in maintaining the e-mail mailboxes identified in the Certificate of Authority because if the mail boxes are not accessed a SSD will not be alerted to the need to complete the required IA data, and they will not recover their share of the Interim Assistance Reimbursement payment.

Action List
Interim Assistance Reimbursement (IAR)

Direct Deposit Information
(Attachment B)

o   Identify if a new account needs to be established for the direct depositing of the SSD's share of the IAR payment, and do so if necessary.

o   Contact the bank if help is needed to fill out the banking information section of the form.

o   Inform the bank of the future direct depositing agreement and obtain the bank contact information.

o   Place the Direct Deposit Information form on an Agency Letterhead.

o   Sign form – The Direct Deposit Information form should be signed by an individual in charge of the SSD's bank account information.

o   Mail the completed and signed form along with the Certificate of Authority to:
Justin Gross
New York State
Office of Temporary and Disability Assistance
40 North Pearl Street, 14th floor section C
Albany, New York 12243-0001

GSO e-IAR Website Registration Form
(Attachment C)

o   Identify who in your agency will need access to the SSA secure website.

o   Complete User contact Information Section of Form for each individual requiring access to the SSA secure website.

o   The SSA will complete the sponsor Verification section.

o   Confirm that anyone who is listed on a GSO e-IAR Website Registration Form is also listed by name and Job title of the Certificate of Authority. SSA will compare the GSO e-IAR Website Registration Form to the Certificate of Authority. If an individual is not listed on the Certificate of Authority, neither a PIN nor Password will be provided.

o   Send completed form to the e-mail address: ny.eiar@ssa.gov.

Action List
Interim Assistance Reimbursement (IAR)

ListServe
(Attachment D)

o Identify the individual in your agency who will be responsible for maintaining the list. This individual must be on NYSeMail, OTDA's global address list in outlook (usually a local system administrator.).

o Identifiy the members of the distribution list including the individuals that have an external e-mail address (not in Outlook.)

o Complete the information for the above mentioned individuals including name, e-mail address, HSEN user ID (if in Outlook), and telephone number (if in Outlook.)

o Send the completed form along with the E-Reporting Form to the e-mail address: Pam.Pomiber2@otda.state.ny.us.

E-Reporting Form
(Attachment E)

o Identify the individual in your agency who will have the responsibility to monthly submit data to CEES via Centraport.

o Complete the information for the above mentioned individual including name, telephone number, e-mail address, and FAX number

o Send the completed form along with the Listserve to the e-mail address: Pam.Pomiber2@otda.state.ny.us.

CENTRAPORT - FACT SHEET
https://otda.state.nyenet/centraport/

New York State's human services agencies (OTDA, OCFS, DOH) and OFT, provide a central point of access to the information and computer systems needed to perform normal agency functions. This central point of access is called **CentraPort**. CentraPort is a gateway to the Internet and State Intranet—a starting point for users to access frequently used programs or sites. It provides access to a personalized collection of information and computer applications, including locally developed initiatives, on a single summary screen.

CentraPort is available only from the New York State Human Services (NYSHS) Intranet by using a secure username and password. It is browser-based, which means it looks and functions like a website on the Internet.

From CentraPort, the user clicks links (which are shown as icons or underlined text) to access a file or computerized system application.

CentraPort provides numerous data, system, and web page links. They are grouped into the following areas:

❑ **Agency Websites**
OTDA, DOH, OFT, and OCFS homepages
❑ **Legacy Systems**
Access to CSMS and WMS through Attachmate
❑ **Directories**
County Profiles, NYS Telephone Directories and access to OTDA statewide and county statistics
❑ **Applications**
E-HEAP, SOLQ, Web EEDSS, I/EDR, EBT Web Admin, eMedNY, WTWCMS,

CENTRAPORT - FACT SHEET

Automated Application Module (AutoApp), COLD, COGNOS Upfront Access and eReports.

❑ **Laws/Regulations**

Book 18, Federal Register, NY Consolidated Laws, NYCRR Title 10 Regulations

❑ **Desk Guides**

Access to Food Stamp, HEAP and TA Desk Guides

❑ **Resources**

Food Stamp Source Book, WMS Code Cards, HEAP Manual, Kelley Blue Book, WMS Error List, etc.

❑ **Other Websites**

Web pages for SSA, NYS Inmate Look-Up, US Zip Codes and Addresses, MapQuest, etc. Additional Internet links are made available to county workers, as needs are identified.

❑ **Forms**

OTDA, OCFS and IAF Forms

❑ **Training and Support**

OTDA & OCFS Training Opportunities, CentraPort Reference Guide, Training Space, etc.

❑ **News**

Governor's Press Releases

❑ **Modernization**

Link to Intranet site for Statewide WMS and I/EDR project information.

❑ **My CentraPort**

Users can set preferences on their CentraPort main screen and can change their password.

CentraPort also provides resources, based on programmatic, Functional Area. The **Functional Areas** include Child Support Enforcement, Medicaid, Temporary Assistance, Food Stamps, HEAP, OCFS, Accounting, Employment, Office of Administrative Hearings, NYC Links and Systems/LAN Administration. Within these functional areas, users can access Policy Directives & Transmittals, such as ADMs, INFs, LCMs and WMS Coordinator Letters, as well as other program specific information, including

the E-HEAP Workbook Demo and the HEAP Oil Buying-Participating Vendors.

There is a **CentraPort Intranet Search** tool, allowing users to find documents and resources available on the OTDA Intranet. CentraPort users can retrieve and view federal, State and local agency documents, training and reference materials and statistics. Once the information is viewed and seen as valuable, the user can add the document or web page as a favorite link on CentraPort, so that it can be easily referenced at another time.

The CentraPort Provider Search is an online tool that enables users to search for and retrieve information about state and local programs and community service providers from various New York State agency databases. The Office of Temporary and Disability Assistance (OTDA), as well as other agencies and vendors, maintain these databases. The types of records currently available include:

❑ A list of Congregate Care Facilities
❑ The BICS Vendor File
❑ A list of Electronic Benefit Transfer (EBT), Point of Sale (POS) and Automated Teller Machine (ATM) locations
❑ A directory of state licensed childcare providers and county-specific provider lists.

Workers can search and locate provider services to meet the needs of their clients. Entering the provider type and location information (city, county or zip code) criteria will initiate a search for providers. The specific provider information available includes name, phone number, address, directions and maps to provider sites, and service descriptions. Districts also have the ability to add local service providers to the Provider Search area. Categories have been identified, based on the BICS

CENTRAPORT - FACT SHEET

Vendor file. See the summary, describing the role of the local CentraPort administrator.

Automated Application Module (AutoApp) allows workers to register an application in WMS by using their PC, instead of a WMS terminal. This browser-based application is accessed through CentraPort and enables users to create, register, perform maintenance, as well as withdraw an application on WMS. AutoApp also allows workers to create a temporary or unregistered application, which stores the partial application until all of the necessary client data is received.

Through AutoApp, the WMS worker can generate additional applications from an existing or closed case (Multiple Apps). This eliminates the need to collect duplicate information and allows a new application to be created for different case types. Clearance reports are available on-line through AutoApp. In addition, Clearance reports and App TAD reports can be requested and printed on demand.

Local CentraPort Administrator Role:
Each county may identify an individual as the local CentraPort administrator. This individual may or may not have other administrative responsibilities within the district. The local administrator accesses CentraPort using the same user ID and password as previously assigned, however the properties, now associated with the user ID, grant the authority to function in the administrative role. The local CentraPort administrator's role affects the local users' ability to fully benefit from the resources available through CentraPort. Tasks of the administrator include:

- Adding local service providers into the Provider Search area

- Modifying/deleting local provider records located in the Provider Search area
- Adding links onto CentraPort
- Modifying or deleting locally entered links from CentraPort

It is important for a local administrator to be aware of the resource needs of district staff. Maintaining local service providers in the Provider Search area provides a valuable resource for staff as they search for information to assist their clients. Therefore, it is vital that the lists reflect up-to date information on the providers that accept referrals and provide necessary services for the county. Each district independently decides which local providers should be added to Provider Search area. Some counties may choose to add a comprehensive list of community-based organizations within their county, while others may choose to add only agencies that most often provide direct services to their clients.

The local administrator also maintains local web links. Web links, considered pertinent to all staff, are added and maintained by State CentraPort administrators. Local administrators may add links providing information to assist county workers in their job duties including any locally developed applications, such as front door tracking and workflow initiatives. As with Provider Search, each county decides independently which web links they add to CentraPort.

For More Information About CentraPort Contact:

Laura Ziegler
LAURA.ZIEGLER@DFA.STATE.NY.US
473-2578