

GENERAL INFORMATION SYSTEM
Center for Employment and Economic Supports

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TO: Subscribers**SUGGESTED DISTRIBUTION:** Commissioners, TA and SNAP Directors, HEAP Coordinators, Staff Development, WMS Coordinators**FROM:** Phyllis Morris, Deputy Commissioner
Center for Employment and Economic Supports**SUBJECT:** Protocols for HEAP Alternate Certifiers and myWorkspace Access for Alternate Certifiers**EFFECTIVE DATE:** Immediately**CONTACT PERSON:** HEAP Bureau at 1-(800) 343-8859, extension 3-0332

The purpose of this GIS message is to provide Social Services Districts (SSDs) with clarification regarding HEAP Alternate Certifiers (AC's). The AC's role and responsibilities have not changed from previous years. AC's cannot determine final HEAP eligibility, complete final HEAP authorizations in Welfare Management System (WMS) or alleviate energy emergencies by guaranteeing payment to energy vendors. What has changed is that applicants can now apply for a regular HEAP benefit using myBenefits and SSDs (including their ACs) must use myWorkspace as the primary computer application to process regular HEAP applications.

Alternate Certifier Roles in myWorkspace:

The SSD identifies the AC role that works best for their operations and is responsible to communicate the roles and responsibilities to the AC. SSDs can grant one of two levels of entitlements in myWorkspace; either an AC worker or an AC supervisor. A listing of the AC worker and supervisor functionality in myWorkspace is found in the GIS 13 TA/DC026 and the attached chart "HEAP Alternate Certifiers myBenefits/myWorkspace Protocols."

Additionally, the chart identifies actions an AC can complete in myWorkspace, actions an AC cannot complete in myWorkspace and the advantages of the AC assisting HEAP applicants in submitting an application in myBenefits.

Attachment

HEAP Alternate Certifiers – myBenefits/myWorkspace Protocols

What Alternate Certifiers (AC) Can Do	What Alternate Certifiers (AC) Cannot Do
<p>AC and AC Supervisors can</p> <ul style="list-style-type: none"> • process only Case Type 60, • perform application inquiries, • calculate and store Automated Budgeting and Eligibility Logic (ABEL) budgets, and • calculate scratchpad budgets. <p>AC Supervisors can also withdraw applications.</p> <p>For example, if an SSD made arrangements for an AC to calculate an ABEL budget, it must be submitted to the SSD for final approval.</p>	<p>AC and AC Supervisors cannot register a new application in myWorkspace.</p> <p>Only the SSD can register new case applications through the Application Registration process in myWorkspace.</p> <p>New case applications submitted through myBenefits are automatically registered in WMS through myWorkspace.</p>
<p>With permission from the applicant AC and AC Supervisors can help new and returning applicants use myBenefits to apply for HEAP.</p> <p>The application is submitted from the AC’s location using the applicant’s account information.</p>	<p>AC must not issue benefits or guarantee payments.</p> <p>AC cannot sign the authorization document (3209).</p> <p>The 3209 must be signed</p> <ul style="list-style-type: none"> • by a SSD worker or supervisor, or • as based on an OTDA approved SSD Case Supervisory Review (CSR) plan.
<p>The SSD must assign cases to the AC. Names of users who are assigned the AC and AC Supervisor roles in myWorkspace will display in the “Assignee ID” dropdown box used by SSD clerical and supervisory staff to assign applications.</p> <ul style="list-style-type: none"> • Both the SSD and the AC can see all district HEAP applications in the “Worker Inbox.” • The SSD must decide which cases are assigned to the AC. • The SSD does not have to assign them for the AC to see them. <p>Note: Recommend HEAP staff visit their district SNAP staff to discuss how SNAP assigns applications to AC. This may help in deciding how to assign applications.</p>	<p>AC cannot run a clearance report.</p> <p>AC cannot submit a pending transaction directly to WMS.</p>
<p>AC can conduct a search by SSN or CIN to retrieve information currently displayed on the HEAP Individual History-WTRK17 (J-Screen) in WMS.</p>	<p>AC does not have the ability to type ASSIGN in the CIN field in myWorkspace.</p>
<p>AC will be able to access myWorkspace, even if they are not housed in offices that are on the HSEN, when provided with</p> <ul style="list-style-type: none"> • remote network connectivity, and • assignment of appropriate user roles. 	<p>AC cannot transfer a case to another county.</p>

HEAP Alternate Certifiers – myBenefits/myWorkspace Protocols

Advantage to the Alternate Certifier Assisting HEAP Applicants in Submitting an Application through myBenefits

An AC that assists a regular HEAP applicant in completing and submitting an electronic application through myBenefits ultimately ends up registering the application in myWorkspace. Any application submitted via myBenefits is automatically registered and transmitted to the SSD's myWorkspace "Inbox," regardless of who actually submits the application; the applicant (alone), the applicant (with help from an AC) or the SSD when a paper application is received.

The AC should be instructed to educate the applicants that want to submit a paper application for regular HEAP about the following advantages of applying electronically through myBenefits:

- Applicants can check on status of application.
- Applicants can see the amount of the approved benefits.
- Applicants can electronically submit documentation to SSDs that have I/EDR.

Note: Any paper application electronically submitted by the AC with the permission of the HEAP applicant assists the SSD in the following ways:

- SSD will not need to register the application in myWorkspace.
- There will be no paper application to physically transfer from the AC to the SSD.
- Calls about their benefit status and benefit amounts or deposits in their EBT account from the applicant to the SSDs should be reduced since applicants can do this on their own through myBenefits.