Office of Temporary and Disability Assistance

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General Information System (GIS) Message

Section 1

Transmittal:	26DC006 Upstate
Date:	February 2, 2026
To:	Subscribers
Suggested Distribution:	Commissioners, TA Directors, SNAP Directors, HEAP Coordinators,
From:	Valerie Figueroa, Deputy Commissioner, Employment and Income Support Programs
Subject:	Supervisory Approval of Transaction Checkbox in myWorkspace
Effective Date:	Immediately
Contact Information:	Supplemental Nutrition Assistance Program (SNAP) Bureau – 518-473-1469 or snapbureau@otda.ny.gov; Public Assistance (PA) Bureau – 518-474-9344 or tabureau@otda.ny.gov Home Energy Assistance Program (HEAP) Bureau – 518-473-0332 or nysheap@otda.ny.gov;

Section 2

The purpose of this GIS message is to inform social services districts (districts) of the new Supervisory Approval of Transaction checkbox in myWorkspace. This checkbox is to be used by district supervisors to attest to the review and approval of case transactions, providing an alternative to printing and signing the Welfare Management System (WMS) Non-Services Authorization (LDSS-3209) or an approved local equivalent. The new checkbox is immediately available for district use and is located at the bottom of the summary tab in myWorkspace (see myBenefits/myWorkspace/IEDR Release Notes 25.3.1).

Background

Social Services Law 18 NYCRR § 350.2(a) states, in part, that assistance may be provided to an eligible person only after a district prepares its approval of the issuance on a state-prescribed form. Currently, districts outside of New York City use the LDSS-3209 (or local equivalent) to authorize PA, SNAP and HEAP benefits in compliance with state requirements. While the LDSS-3209 is signed by the worker who prepares the transaction, the document becomes the official authorization once it is reviewed and signed by the supervisor. The

exception for this procedure occurs when a district participates in a case supervisory review process (See 99-ADM-4).

Prior to a regulatory change in 1999, districts were required to have supervisory review approval and sign-off on all transactions. Since then, 18 NYCRR § 351.7 allows districts the option to implement a district-specific supervisory review process using a targeted, random sample of PA, SNAP, and HEAP cases. This case supervisory review (CSR) process permits districts to develop a CSR plan tailored to their caseload characteristics and staffing structure. Under the CSR, districts review a targeted, statistically valid random sample of cases to satisfy the supervisory review approval requirement outlined in 18 NYCRR § 350.2(a). The primary purpose of the CSR is to identify deficiencies in case processing and to develop corrective action measures to address those deficiencies. OTDA approval is required before a CSR plan or any amendments are implemented.

Guidelines for CSR plan development, implementation and approval for PA and SNAP cases are set forth in 99-ADM-4. CSR plan development, implementation and approval for HEAP cases is outlined in 26-LCM-02.

Section 3

Program Implications

In accordance with 18 NYCRR § 350.2(a), once a supervisor reviews a case in myWorkspace, the Supervisory Approval of Transaction checkbox provides them with the ability to approve a transaction prepared on a state-prescribed form. Use of the checkbox as the prescribed form is determined by each policy area.

SNAP

Districts should use the Supervisory Approval of Transaction checkbox for all SNAP transactions processed in myWorkspace that require supervisory approval. Districts without dispensation to forgo supervisory approval under an approved CSR plan must ensure that all transactions undergo supervisory review and approval prior to authorization. Worker signature requirements are satisfied when the transaction is submitted for approval in myWorkspace.

For SNAP transactions processed in WMS that require supervisory approval, districts must ensure that benefits are issued only after proper review and supervisory authorization, in accordance with state requirements, using the LDSS-3209 or an approved local equivalent.

HEAP

Districts may use the Supervisory Approval of Transaction checkbox for all HEAP transactions including Regular, Emergency, Cooling, or Heating Equipment Repair and Replacement (HERR) processed in myWorkspace that require supervisory approval. Worker signature requirements are satisfied when the transaction is submitted for approval in myWorkspace. The HEAP Application (LDSS-3421), Emergency Benefit Budget Worksheet (LDSS-3594B), or Cooling Assistance Request for Benefit (LDSS-4992) may be used for required signatures if the district chooses to do so.

For HEAP transactions processed in WMS that require supervisory approval, districts must ensure that benefits are issued only after proper review and supervisory authorization, in accordance with state requirements, using the HEAP Application (LDSS-3421), Emergency Benefit Budget Worksheet (LDSS-3594B), or Cooling Assistance Request for Benefit (LDSS-4992). Worker signatures are required for all HEAP transactions not processed in myWorkspace.

PA

Districts may use the Supervisory Approval of Transaction checkbox for all PA transactions processed in myWorkspace that require supervisory approval. Worker signature requirements are satisfied when the transaction is submitted for approval in myWorkspace. The LDSS-3209 can be used instead of the myWorkspace checkbox if the district chooses to do so. Districts without an approved CSR plan may not authorize PA transactions without supervisory approval.

For PA transactions processed in WMS that require supervisory approval, districts must ensure that benefits are issued only after proper review and supervisory authorization, in accordance with state requirements, using the LDSS-3209 or an approved local equivalent.