DHS Oregon Department of Human Services **Children, Adults and Families**	**Information Memorandum Transmittal**

Monte Burke, Program Manager
Food Stamps and Program Integrity

Authorized Signature

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Subject: Tips for Managing a FS Caseload from the 2006 Accuracy Summit

Applies to (check all that apply):

☐ All DHS employees	☐ County Mental Health Directors
☐ Area Agencies on Aging	☐ Health Services
☒ Children, Adults and Families	☒ Seniors and People with Disabilities
☐ County DD Program Managers	☐ Other (please specify):

Message: This collection of tips and best practices from the 2006 Accuracy Summit participants is intended to allow staff and offices to benefit from each other and network regarding practices which save time and increase efficiency. Please use this document individually and in team and staff meetings to evaluate what tips and best practices might be relevant and useful to individual workers, teams or the office as a whole.

If you have any questions about this information, contact:

Contact(s):	Pam Prichard		
Phone:	(503) 881-8253	**Fax:**	(503) 373-7032
E-mail:	Pamela.prichard@state.or.us		

Tips for Managing a FS Caseload

Compilation of Individual and Office Tips/Best Practices
Offered by Participants of the 2006 Accuracy Summit Session:
Tips for Managing a FS Caseload
Updated 10/06

This collection of tips is divided into three sections: Individual Tips, Office Tips, and Processing Center Tips. Tips were offered by summit participants during the summit session. They have been transcribed here with the best intention of capturing the information accurately. Contact names given are not necessarily the name of the individual providing the tip.

Individual Tips

Reporting System:

Put as many cases in SRS as possible

Verification:

If you can make a phone call for verification and can do so quickly and easily, make the call instead of pending. Pending generates additional work and client contact. For example, when possible, call an employer for income verification or call Social Security for social security income when the amount is not on BENDEX rather than pend.

Don't request unnecessary verification. This saves time in filling out the form, narrating the request, tracking it, handling further client contact, etc. For example, do not:

- Ask for collateral statements to verify $0 income, unless questionable.
- Insist on a written statement for verification when a verbal statement suffices; e.g., verifying income by speaking to the employer, but asking for written statement in addition.
- Verify SAVE at each certification when the client's noncitizen status remains the same and the document hasn't expired.
- Verify rent unless it's questionable.
- Verify the SSN when it has been verified previously
- Make a new copy of ID at each certification.
- Verify birth for FS unless the information is questionable.
- Verify HH composition unless questionable

Do not pend for income of a homeless clients; e.g., asking for receipts from clients collecting bottles and cans or proof of how homeless client purchases shampoo and soap.

Returned Mail

In SPD or AAA offices, call the client before acting on returned mail. Some mail such as medical cards are stamped return within 3 days, and are returned due to clients not checking their mail often enough rather than having moved.

Processing Applications

Use a stamp or label on applications to mark off computer screens that are checked. Use a stamp or label to record filing date, 30th day and 45th day, etc.

Schedule protected time if that is a possibility at your office. Schedule the time on GroupWise and use the Notify feature so the appointment pops up on the screen.

Place folders numbered 1 through 31 in a bucket and file incoming mail according to the day received, so one can easily track change reports for processing within 10 days.

Keep recertifications in chronological order.

Keep a list of recertifications coming due and cross them out as completed. This provides a visual reminder for closing with 10-day notice for those not received.

Remove excess paperwork from recertifications before processing.

Create a worksheet for all cases showing what programs they are on, income calculations for the different programs, etc.

Provide clients with tips that will help in the processing; e.g., putting their case ID number on information that is turned in, what kind of verification to bring, etc.

Prioritize work by date and the last digit of SSN; e.g., to process client's paperwork with an earlier issuance date first, such as DHS 852 *Interim Change Reports* received, etc.

Before transferring a case to a processing center, check to make sure there is no open JAS case.

Consider certifying some cases in SRS for 6 months to vary when recertifications come due. Do this during months that you have a large number of new applications. Use your narration software to see how many interim reports or recertifications will be due on certain months.

Review how your desk is organized. Consult with a coach or peers on options for desk organization if that would be helpful. Schedule time to make necessary changes.

If you'd like to see different processes considered for doing the work of the team or office, bring an agenda item to a team or office meeting, or form a process improvement committee or workgroup.

Use the WORK number screen to identify income sources. If not already familiar with this screen, become familiar with it.

Income Calculation

When pay is received every other week, convert using the 2.15 factor versus spending extra time converting pay received every other week to a weekly amount and then multiplying by 4.3.

When client works different pay rates, average monthly pay rather than averaging hours at each pay rate which is much more time-consuming and prone to errors.

Narration

Use partially filled-in templates for certain populations; e.g., homeless shelters, D&A facilities, homeless shelters, residential care, etc.

Indicate at the top of the narration template which programs are being applied for and skip the sections below that aren't applicable. For example, rather than writing "not applying" on every space on template related to OHP, indicate at top that client is not applying for medical.

Do not repeat the income calculation in the narrative; e.g., narrating child support calculation under the SMUX line and repeating it under the calculation line.

Print the electronic calculation form to narrate NC2 with income calculations. Refer to the form in the narration.

Narrate during the interview when the client is present. Interruptions from other staff are less likely during this time. Also, if you discover unanswered questions while narrating when the client is still in the office to answer them, this reduces the need to reach the client later on.

Do narration in Word where you can use tools such as spell check. Also, Word saves the file automatically in case of a system crash so you don't lose your work, unlike TRACS. Cut and past the Word narration into TRACS or ACCESS when you're done. Some workers use a table in Word so they can tab from field to field.

Client Interview

Schedule time to prepare for an intake or interview by researching screens, TRACS or ACCESS, and keeping a note of things that need to be followed up on when the client is present.

If you become aware that the client will only be receiving $10, let them know as soon as possible and at the same time educate them about the other benefits of receiving FS…OTAP, school lunch program, etc.

Review rights and responsibilities and talk frankly about expectations and consequences such as overpayments that may occur if changes are not reported or information is incomplete. Ask them “Have I answered all your questions?” or “Do you have questions?” to help ensure that the client is clear on programs and expectations.

Client Phone Contact

If you receive information that would result in a benefit reduction during a phone call, send the reduction notice during the call. Complete whatever action is needed while you are on the phone with the client. Wear headphones so others can see you are busy during this time.

Return calls at scheduled times. Include this information as part of your voice mail greeting and educate clients about the hours you return calls. Include the time frame for returning calls in your voice mail, e.g., “within one business day” or “within 24 hours,” to reduce instances of clients leaving repeat messages.

If you have a specific caseload in which clients tend to ask the same questions, consider leaving the answers to the most commonly asked questions on your voice mail greeting as well as instructions on how to bypass the greeting.

If you are bilingual or have a long greeting, provide information in your recorded phone greeting regarding the key to press to bypass the greeting and go directly to voice mail.

Rather than leaving a message on a non-English speaking client’s answering machine, send a hand-written message to prevent misunderstandings.

When returning or answering a call, consider informing the client at the beginning how much time you have for the call.

Tracking Client Follow-Up Dates

Instead of creating one long narration, divide the narration into sections for which each requires some kind of follow up. Use the tickler feature in TRACS on each section for the related action; e.g., the 30^{th} day, the 45^{th} day, dates related to OFSET participation, dates related to making payments, etc. Contact: Frank Miller, NE Hollywood Portland SSP.

Notices and Letters

When possible, send out multiple notices at once so if the text added to NOTM is the same, you can copy and paste it.

Use Macros, QuickKeys and Templates for letters (OFSET).

Favorite Cheat Sheets or Forms

Medical Deductions for FS spreadsheet available on Forms Server (DHS 221MED)

FS Worker Guide # 9—FS Report Systems at a Glance

Office Tips/Best Practices

Across the State:

Use of Process Improvement within offices and teams/workgroups, on topics such as streamlining intake process, application process, etc. (Resources: Paddy O'Brian, DHS, and Michelle Wallace, CAF SSP)

Meetings for HSS3s on a regular basis (weekly, monthly, etc) to review cases, changes or new methods that work.

Provide a copy machine, FAX and phone in the lobby for client use. Reduces requests to front desk for copying, faxing or calling. Phone allows 1-800 number access but no other long distance. (SE PTLD SSP and others)

SDA 1--St Helens SSP: St Helens SSP doesn't schedule FS intakes two days of the month—the first day of the month is free day for catching up on processing. A day in the middle of month is reserved for processing, including SRS 852s. Some workers pend for last day of month or for the day before mid-month processing when possible. They find they get more back from clients on those times and are able to more effectively use the two non-intake days. Clerical staff build screens for staff on pended cases, prescreen the application and check for completeness, call and verify closure of out-of-state benefits, transfer cases online, and issue temporary medical cards. (Contact person: Pam Ruddell)

SDA1-St Helens SPD: Two to three SPD staff have arranged access to TRACS so they can verify information on extended family supports who are SSP clients.

SDA1-Astoria SSP: Three of the FS workers assigned to intake only and three do processing only. Roles are shifted every few months.

SDA1-Tillamook SSP: Support staff screen client requests to talk to/see worker during protected time to determine if it is truly an emergency. When clients come in at the first of the month to schedule recertification appointments, they are given appointments towards the end of the month which allows people applying for the first time and expedited clients to be seen more promptly.

SDA 2 SSP Use of core cards to ensure that all necessary training has been covered and passed. Contact person: Amra Biberic.

Use of the FS 415E envelope in which to put the FS application when given to clients. The 415E has a check list on the outside to remind clients of what to bring to their intake. Contact: Angela Day.

SDA 2 New Market Center
Office expectation of using GroupWise calendars. Each worker is required to set aside time for 28 intakes a week on their GroupWise calendar in slots titled "FS intakes" with "Show As" status of Free. These slots are designated two weeks in advance. Front desk staff have proxy rights to all the FS workers' calendars. Receptionist makes intake appointment and enters client's name and last 4 digits of SSN and changes "Show As" status to Busy. Time is saved in the ease of scheduling as well as the ability to determine when a person was seen if no narration was done.

Office procedure has been created regarding missed appointments. A card is sent and the appointment rescheduled toward the end of the 30 day period, unless circumstances warrant scheduling earlier. The rescheduled appointment is narrated immediately in TRACS to prevent duplicate scheduling of appointments in multiple branches. In the past, clients would have as many as 5 rescheduled appointments. Clients currently miss and reschedule fewer appointments and there is not as long a wait to get an open appointment slot for first-time schedulers.

A strong branch preference exists to do at least basics of narration when client is in office. It's OK to add to the narration later on; however, it's highly discouraged to recreate the entire interview at a later date by re-reviewing the entire application and relying on memory. Recreating the narrative at a later date is inefficient and increases the chance of errors. Narration at the time allows narration of client's agreement of estimates of income. Workers also narrate more efficiently while the client is present as the time is reserved. After the client leaves, the probability of frequent interruptions increases greatly. The branch has found that clients are glad to have you narrate at time if it is introduced as "I'm going to go through this with you very carefully to make sure this is accurate."

Once a week, FS workers meet for a peer review of FS cases with income. Workers bring all cases with income from the prior week along with the verification and narration. Workers rotate the cases around the room to check each other's income calculations. Workers also share information from trainings attended at these meetings.

An in-office agreement exists not to spend time debating policy, but instead have the lead worker research policy questions and send out to group in writing.

Leads provide policy in writing printed out from manual or from e-mails from analysts and refrain from giving verbal answers.

An orientation folder is provided to each FS client at their appointment. The folder includes the R&R form, SRS reporting requirements, resource material, community resources, etc.

The folder provides workers with a structure to orient clients about each item, particularly rights and responsibilities and reporting requirements.
(Contact person: Jane Moore)

A community resource list is kept on Excel so it can be easily referenced by category online or printed out. Contact: Katie Bond

SDA 2 NE SSP

The branch has modified their FS group orientation to respond to confidentiality issues. Clients can obtain an application online or by coming to the office. When coming to the office, they initially take a number to be seen. When their number is called they are told they need to fill out and turn in page one and two of the application and take the rest to fill out. They are given a sheet with the date of their appointment and check-in time and what they need to bring with them. When they come back in, they don't have to take a number but just check-in between 8:30 and 8:45. They then have time to make any copies of verification needed using the copy machines in the lobby. They are called by first name for their brief, approximately 15 minute appointment with a worker. Generally, no one is waiting for their appointment after 10:30 or 11:00. The branch does 34-36 intakes a day this way, 4 days a week. Contact: Frank Miller and Suzanne Trotter

SDA 2 Beaverton SSP

HSS3s screen FS applicants for potential TANF eligibility and refer to Assessment Program and related FS intakes for those interested in receiving TANF. Contact: Laura Cole

SDA 3 McMinnville SSP

FS workers are specialized into 3 teams. One team does intake only—9 intakes a day. Another carries a generic caseload of 350 cases per worker. The third team works a banked caseload at 500 cases per worker. Staff volunteer to be on the team of their choice. The model allows work to be distributed among the various teams and processing time is allocated differently based upon a given workers perceived strengths and skill levels; team work is very important, especially during slack/down time in processing excess paper work. Having the intake team take on intakes allows much more time for the banked and generic caseload workers to do their work. Support staff do the initial case set-ups. (contact: Duane Duran)

The use of instant messenger by all staff members is highly encouraged. It is used by almost all workers for notification of client arrival, to answer questions regarding clients, to answer policy questions, etc. (Contact person: Melissa)

Support staff review certifications and 852s and send out pending notices as well as coding BED on cases where appropriate. (Contact person: Jennie)

Use of a flier for students regarding FS student eligibility.

SDA 3 South Salem SSP: Unit clerks do all filing for workers.

SDA 3 Teen Parent SSP: Branch uses Instant Messenger to ask each other questions during intakes. Staff all use and have proxy to each others GroupWise calendars for scheduling appointments and meetings.

SDA 3 North Salem SSP: Unit clerks check in clients for FS Orientation and deliver the opening. Staff has obtained GroupWise proxy to partner staff's calendars to schedule staffings. FS Orientation occurs in the morning where each client is briefly seen face-to-face. Workers have the afternoon to put the cases on line and complete narration.

SDA 3 Dallas SSP: HSS1s do expedited FS intakes.

SDA 3 Keizer SSP: Clerical staff tracks all mail received on TRACS sticky note.

SDA 4 Lebanon SSP: For a period of time, FS teams specialized roles when the skill sets of individuals allowed this to be done efficiently, resulting in significantly increasing productivity and accuracy. (Contact: Alice Bober)

SDA 4 Albany SPD: SPD workers screen new clients rather than front desk staff. They find it works better for the worker to hear the story from the beginning rather than having the client talk to two different people.

SDA 4 Albany SSP: Clerical staff narrate on TRACS as information is received by the client.

SDA 5 SPD

Use of the free software, Openoffice, to allow use of Excel Spreadsheets such as the medical deduction worksheet.

Workers are encouraged to use Outlook post-its when filling out the narrative template. If Access shuts down while they are in the middle of doing a template, the post-it remains.

Expectation for workers to screen recertifications on arrival, see if anything is missing and send out 210s at that time for signatures, missing information, verification, etc. They have found it is much more efficient to screen initially rather than wait until the worker is ready to process the application.

Expectation for each worker to have a box for current and pended recertifications filed in date order. The copy of the 210 is placed in the box with the pended application. Applications in the current recertifications box have been prescreened. The last week of the month, the current recertifications are then sorted by last digit of SSN so that the worker can work 0s and 1s first to coincide with FS issuance. This consistency makes processing applications more efficient and allows for easier coverage of caseloads.

Expectation for workers to enter at least the basics of narratives within 48 hours of the interview.

SDA 5 SSP
Clerical staff process returned mail, change of address information, send close notices or notify the worker to see if a case should be closed. Clerical staff screen recertifications up to the point of seeing what needs pended. Support staff are assigned to specific support roles.

SDA 5 SSP McKenzie Center

Offices use instant messenger to alert FS staff of appointments.

Offices use a support staff person to assist with group conciliations and disqualifications. (Contact person: Lucy Lynch)

SDA 5 SSP West Eugene

Management looks at the FS caseload every month and balances the caseload among workers. FS workers meet on a weekly basis. Meetings include lead workers, HSS4s, FS reviewers and managers who provide support to the FS team. Protected time is built into schedule. Support staff pull voicemails and write them down for workers who are out.

SDA 5 SSP Springfield

Support staff use a list of open cases to remove files from worker's drawers that should be archived.

SDA 5 SSP E Springfield
The office offers drop-in hours from 1-3 pm each day and workers are scheduled to be available. Case managers do both TANF and FS orientation so clients don't need to make multiple appointments.

SDA 6 SPD

There is a branch expectation that all FS intakes be done face to face unless there is a reason not to. 95% of FS intakes are done face to face. HSS3's have one field day and one office day for appointments. FS appointments can be done on either of these days or scheduled at another time. Although recertifications don't necessarily have to be face-to-face, when there are issues like transportation, the office has found that face-to-face interviews are more accurate and efficient. Workers often miss things when intakes are done over the phone causing the worker to have to do extra follow up by mail.

SDA6 Roseburg Lane Council of Governments:

The office has one day free of intakes, usually the last day of every month.

Clerical staff keep a log in which they record when applications are sent out and returned. This saves time in cases when a client calls and says they never received the application.

The office wanted to use the FS medical deductions spreadsheet which is available on the forms server but couldn't afford to purchase the Excel spreadsheet that the database runs on. The office obtained the free software package, OfficeCalc , online, that allows the downloading and use of Excel spreadsheets without the user being licensed for Excel. Using the FS medical deduction spreadsheet reduces the possibility of double counting receipts as the worker can see all of them in one place. It also reduces calculation errors.

The branch has customized their FS Narrative template, particularly the sequencing and formatting, that is cut and pasted in ACCESS.

In meetings, staff are given reminders not to pend for unnecessary information such as verification of rent or utilities. Reviewers are also encouraged to note information for which the worker unnecessarily pends and call this to worker's attention with a FYI.

In meetings, staff are given reminded not to deny apps for information not necessary to determine eligibility, such as not providing proof of space rent for a mobile home. Reviewers are encouraged to note these erroneous. These denials create additional work not only in the unnecessary pending notice but also in the later need to restore benefits.
(Contact: Amy Evenson)

SDA 6 Roseburg SSP: The Roseburg office offers highly structured, intensive in-house training for new FS workers with specific timelines and benchmarks. Training for new FS workers includes a full review of all eligibility determinations, case coding and narrations for first 6 months. This in-house review is much more in-depth than QC or targeted reviews. The review process is used as a training tool with the intent of teaching foundational concepts that help prevent errors, such as an understanding of the filing groups and how to narrate them. When new FS staff's cases are reviewed, the staff member is referred to the FS manual to research policy, so the training results in building the worker's familiarity with the FS manual.

As part of the intensive training/review process, staff receive review and coaching by the two reviewers, a manager, a lead worker, and a HSS4. All new FS staff choose an individual coach or mentor in addition to being part of the intensive training/review process.

Training tools for new workers include a variety of checklists and sign-off sheets on topics such as understanding and being able to use all the related mainframe screens. Checklists hold trainees accountable for identifying training issues; e.g., signing off as being confident in their abilities in an area or getting more help. Another tool used is a training agreement that both coach and new staff sign that addresses expectations and potential barriers to success as well as steps to create an optimum learning environment.

As part of the training process, branch-wide standards are set. A few examples are that every dollar amount must appear in TRACS. FCAS entry is then done by referring directly to TRACS, which reduces errors. Another example of an office standard is that TRACS must reflect the source of income for payment of expenses. New staff learn to narrate according to policy terms; e.g., to narrate if income meets the criteria from policy of a loan or gift rather than narrating that client states something is a loan or gift. Branch-wide standards provide the foundation for better interviewing techniques and narration.

The training process is so structured and clearly laid out that it's evident when benchmarks are not being met and the reason is evident; e.g., difficulty mastering calculation, or difficulty mastering application of policy, etc. The structure provides objective data that is helpful to both staff and their manager(s).

Spot reviews are done on experienced workers and if there is a pattern of errors, subsequent reviews are done while simultaneously offering. Spot reviews, particularly during policy changes, allow the branch to head off errors before they are found in QC or targeted reviews.

The Roseburg branch has been able to measure increased accuracy for individuals as well as the branch as a result of their training and in-house review processes.

FS team divided into an Intake Unit and Processing Unit and cases move back and forth between the units. Processing Unit has switched from a banked caseload to five individual caseloads.

Contact: Mark Schiffer.

SDA 7 SSP Gold Beach

Every piece of received mail is narrated by the clerical staff for tracking purposes.

SDA 7 SSP Coos Bay Newmark One-Stop Center

Up-front staff do a holistic screening of all FS applicants, including screening for income, HH composition, child living with parents, etc. They check for potential eligibility for other programs even if the program is not marked on the application. For example, if a client is potentially TANF eligible, up-front staff refer the client to TANF Assessment where FS are also processed. If the client is from out-of-state, the up-front staff make any necessary phone calls to check the status of the case to save time later at intake. Up-front staff also transfer cases from within Oregon and set up an initial hard file if no hard file existed. The up-front staff set up cases in TRACS in order to narrate screening for clients with no existing case.
Contact: Laura Cole

SDA 8 SSP Grants Pass

The FS unit includes a team that only processes recertifications. This specialization has been efficient as it takes advantages of team members' strengths.

District 8 has created and set out customer service expectations, including expectations around narrations, time frames for processing changes and redeterminations, time frames for responding to client's calls, etc. These expectations create a standard to strive for.

One person on the FS/medical team does fewer FS intakes but handles all emergent medical applications. This form of specialization has worked well by removing emergent medical from duties of other FS workers. Protected DV workers process DV cases. (Contact person: Verna Dassen)

SDA 10

An ERDC unit for the SDA handles any ERDC or ERDC combined cases. This specialized unit in the Redmond branch takes care of the majority of the ERDC cases as well as ERDC intakes. Cases leaving TANF are handled by case managers.

SDA 10 SSP Bend

For combined FS/TANF cases, an HSS3 does the initial eligibility intake for FS/TANF and medical programs prior to the case going to a case manager for the assessment. The HSS3 and case manager work as a team. Same day service is offered for FS intakes resulting in 90% of clients being seen the same day. The office uses the GroupWise calendar for appointments. The office worked with Michelle Wallace, SSP resource person for process improvement, to redesign processes and significantly cut down on number of times a client has to go to the receptionist during the application process. Using process improvement, the office reorganized their intake schedule to save workers time with better utilization of existing slots. The office is moving towards training all HSS3s in working with DV clients so that DV clients can be seen right away. (Contact person: Melanie Ybarra)

SDA 10 Bend SPD

The office has open intakes from 8 am – 4 pm four days a week with staff having 1 protected day each week. Clients are given the option to be seen later the same day or come back on another day. Staff's protected day is used for paperwork, although workers still answer phones. Intakes are offered on a first-come, first-served basis. Clients are seen right away the same day, which seems to be the client preference. Previously, when appointments were scheduled out in the future, clients had to wait for longer periods of time which resulted in increased missed, cancelled and rescheduled appointments. (Contact: Jane Barr)

SDA 10 SPD Prineville

In the past, face to face intakes have been used as much as possible. Clients are sent a letter to ask them to come in for an individual appointment. (Contact: Jane Barr)

SDA 12 SPD

SPD in SDA 12 has created Eligibility and Service templates to use with ACCESS. The templates are created using a form action in Word. Before copying the template, one must unlock the "form" to highlight the entire text. Instructions are included for using the template. The template seems cumbersome at first, but after a couple of narrations, staff start to see how time saving it is. The drop-down menus in the template do not replace any eligibility determination the worker makes. It helps the worker by requiring fewer keystrokes. It also reminds staff to ask certain questions. The templates follow the application and ACCESS so it is easy for the worker to organize the case for reviewers.

For example:

- Instead of typing out that the client is applying for "FS/Medical Services" you click once on the dropdown menu and then click on the "FS/MED SERVICES".
- When the worker gets to the Voter registration or utility section, if they do not address that section the comment will be "click here" in the template. That usually cues the worker to address the section.
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Contact: Chela Navejar for obtaining online copies of the template and instructions as well as requesting to be on the list to receive updates.

The FS lead worker reviews every FS case before benefits are issued. The lead worker does monthly presentations during branch staff meetings to discuss trends in FS errors, branch specific procedure and distribute any new cheat sheets or FS tools.

SDA 12 SSP Pendleton:

Custom Labels are created for use on applications that need to be pended. These labels allow workers to easily see what has already been done on the file. Pre-made labels are also put on applications to mark off the screens that need to be checked.

The office has created a Quick-key as a button on the menu bar that automatically moves you through the screens that need to be checked on a FS case. The worker copies the SSN into it once and the worker can adjust the speed that they move through the screens.

SDA 12 SSP Hermiston

All workers use a filing system labeled 1 – 31 for processing paperwork and sort mail in date order so they know how far out they are in processing.

The SDA has a locally produced income calculation worksheet to calculate income for FS (child support, earned income, UC and wages) as well as other programs. The worker enters the amounts of checks, the number of checks, and the factor of 4.3 or 2.15 or 2 and the worksheet does the calculation. Using the calculation worksheet reduces errors in calculating, can be printed off and allows the worker to see calculations for all program benefits in one place.

Offices provide FS staff with laminated wage calendars from a portion of the 859C and dry-erase markers as tools to help determine if a client is paid every 2 weeks or twice a month or whether there are missing pay-stubs. Different colors of dry erase markers are available to track different earners in the household or different types of income. This laminated tool can be wiped off and reused.

Some workers have done drop-down menus for simple choices in the Narrative template in Word. (Contact person: Elisa Lopez)

SDA 15 SSP E Portland

Reception staff screen for DV issues and refer clients to DV point person if DV issues present.

The intake schedule is entered on a spreadsheet on the shared drive that all staff can access.

SDA 15 SSP Oregon City

Front desk staff provide clients with a copy of the 6608A (Cover Letter--Interview for Redetermination--Important Information form) to see if the client meets an exception for the face-to-face interview. Clients who meet the exception are given the option on the form of picking a phone time for an interview, choosing a face-to-face appointment or attending a combination group orientation/individual appointment. Identifying and allowing exceptions to the face-to-face interview cuts down on the number of office visits and can be more convenient for working clients or clients with extenuating circumstances. Having every client fill out the 6608A helps identify these exceptions. Contact: Denise Hale and Joanie Fiore.

SDA 16 SSP Hillsboro

A HSS1 narrates when the application is received and to which worker the application is assigned. The HSS1 sends a confirmation letter to the client that the application was received and schedules a face-to-face appointment if it is needed.

SDA 16 SSP Tigard/Cascade Branch

HSS1s screen applications of clients coming to the branch for intakes. If the client is missing some information or verification, they are told if they come back by 10:30 am they will still be guaranteed an intake that day. This allows clients time to get the missing information in time for the intake. Clients also have the option of staying for the intake with incomplete verification or returning the next day for an appointment. Providing these options to the client greatly reduce the number of clients with incomplete verification or information at the time of the intake. (Contact person: Angelica James)

SDA16 SSP Beaverton

Reception staff educate clients regarding verification needed and clients are given clear handouts regarding this.

SDA 16 SPD Tigard

The Tigard SPD office sends out redetermination packets early to give clients more time to respond and to allow time for a home visit. For example, they send out a recertification actually due on June 30th on May 1 and asking for return by May 15th. (Contact Person: Anastasia Godsey)

FS Processing Center Tips/Best Practices

SDA 2 Washington County Processing Center: All mail is tracked in a Microsoft Access Database as to date received, who the mail is given to and the date processing is completed. When sending out applications, a cover sheet is included explaining the type of verification needed. (Contact person: Annette Allette)

SDA 2 East County Processing Center: A phone bank made up of HSS1s handle approximately 95% of the phone calls which frees up the HSS3s to do the paperwork. The HSS3s carry individual caseloads. Whenever a FS worker is gone for 4 or more days, an automatic coverage system comes into play in which the coverage work is assigned out by a support staff. HSS3s are paired for emergency coverage and pairs are rotated every 6 months. (Contact person: Oscar Gonzalez)

SDA 2 NE Portland Processing Center: All paperwork is logged in an Excel Database with the date received and who the paperwork was assigned to. The database includes the following fields: client name, SSN/Case#, Form Number received, Program Type (Interim Chg Rept or Medical or Ext Med, etc), Language, Filing Date, FS Expiration Date, DOR, Medical Exp Date, Date Distributed, Worker, Date Re-distributed, Worker. Contact: Svetlana Patterson

Labels are made to be put on paperwork specifying material needing to be returned within a certain period of time, stating "Please provide pending items with this form. Please return these by _____." These labels highlight the deadline and increase the receipt of material within time frames. (Contact person: Svetlana Patterson)

SDA 4 Albany Processing Center: The Albany Processing Center uses a banked caseload with multiple workers providing coverage. Intakes are distributed equally. HSS1s randomly assign and log applications in the order that they come in. Support staff use TRACS sticky notes to track who things are assigned to, including every piece of mail that comes in. For example, TRACS sticky notes are used to note receipt of 852 and who it was given to. A worker who pends the case will narrate in TRACS and also add to the sticky note. When a process is over such as an initial eligibility determination, a change reported, or a recertification, the sticky note is deleted. Tracking the logistics of a case with TRACS sticky notes allows staff to know where everything is and greatly reduces time spent on the phone researching where a client's paperwork is in the process.

Quick-keys and Poppads are created for the entire branch and distributed to everyone. This reduces folks needing to learn how to create them on their own and eliminates the duplication of effort.

An assigned worker of the day takes all the incoming phone calls that the HSS1 can't deal with. Processing center staff serve as assigned worker of the day 2-3 times a month. The worker of the day tends to be very busy with phone calls the first of the month and less busy later in the month. The schedule is rotated so people are evenly rotated through the busy/slower times. During the first week of the month, two workers of the day are assigned and phone calls are rotated between them. Contact person: Alice Bober