

Support Staff Checklist

The Purpose of this checklist is to be used as guidance and support for employees.

Use of columns on this checklist:

Priority: Use to prioritize learning for the new employee using months when topic needs to be learned or mastered. Or can use A, B, C, etc. for job priorities.

Assigned: Check off tasks that are assigned to this employee. Or can use to assign a trainer/job shadow for that topic.

Mastery Levels: Check off when employee reaches these levels:

1. Awareness/Exposure
2. Basic Working Knowledge
3. Proficient

Comments: Use for any notations, areas needing further clarification, etc.

Support Staff Checklist

Knowledge/Skills/Abilities	Priority	Assigned	1	2	3	Comments
Role of Support Staff						
Office Procedure/Branch Organization						
Desk/Work Flow Organization						
Communication Techniques						
Dealing With Difficult Behaviors						SSAM VI.A.3
Confidentiality						Generic Program Elements A
Prioritization of Tasks						
Acronyms: i.e. not program specific (DHS/AAA)						
Professionalism						
Safety Procedures (Natural Disasters, etc.)						
General Knowledge of Programs, Services and Resources-Overview of Clients						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Customer Service						

Procedural Elements	Priority	Assigned	1	2	3	Comments
Reception (Lobby/Telephone)						
Greet Visitors and Callers and Direct Appropriately						SSAM VI.A
Operate Telephone System						
Maintain Forms/Brochures/Supplies in Reception Area and Interview Rooms						
Process for Language/Communication Issues (TTY, AT&T Interpreters, Alternate Formats						
Hand Delivered Document Process						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Mailing Procedures	Priority	Assigned	1	2	3	Comments
Operation of Postage Meter and Scale						SSAM VII.E
Incoming Documents- Date Stamp, Sort and Distribute (Mailed Items and Faxes)						SSAM V.A.1
Outgoing Documents, Sorting and Handling (Certified/Shuttle/etc.)						
Maintain Mailing Labels						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Filing Procedures	Priority	Assigned	1	2	3	Comments
Location of Files (Open, Closed, Deceased)						
Master Case Organization of Hard Files						SSAM IV.A.2
Filing Retention, Purging Archiving						SSAM IV.D
Personal Safety/Handling Materials						SSAM IV.A.1
Case Transfers – In/Out						SSAM IV.A.4 SSAM IV.C
Filing of Manual Material						

Financial/Negotiable Documents	Priority	Assigned	1	2	3	Comments
Receipt – Date Stamp and File (EPD/Pay-IN/Reimbursement)						SSAM II.G
Releasing Benefits – Security, Identification, Confidentiality						SSAM II.J SSAM II.B.3

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Process Returned of Branch Held Benefits (459A)						SSAM II-B.1 & B.2
EBT Cards (clients and Alternate Payees) – New Cards/Replacements/Canceling/PINs/Security/Inventory						SSAM II.A
Depositing Funds (Computer Action/Branch Deposit)						SSAM II.G.1 & G.7
Process Contract RN Invoices						
Contract In-Home Service Monthly Billing						
Lost/Canceled Checks						SSAM II.D
Home Delivered Meals						
Billings						SDS 595

Payroll	Priority	Assigned	1	2	3	Comments
Process Time Reporting						DHS Payroll web page
Process/Reconcile Leave Requests						DHS Payroll web page
New Hire Process						

Client Employed Provider	Priority	Assigned	1	2	3	Comments
Program Overview						SSAM III.B.1
Operation/Application Process						
Provider Numbers-Requesting and Terminated						
Criminal History Checks						SSAM III.B.3 SSAM III.A SSAM III.E.1
Issue Invoices from 546						SSAM III.B.6

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Payment-Related Procedures/ Trouble-Shooting						SSAM III.B.7 SSAM III.D
CEP Files and Invoice Maintenance						
Respite Accruals/Screens						SSAM III.B.2

Procurement	Priority	Assigned	1	2	3	Comments
Ordering, Maintaining, Returning of Office Supplies (Equipment/Forms/Paper, etc)						
Purchasing Systems						SSAM VII.B

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Vehicles	Priority	Assigned	1	2	3	Comments
Report and Logs						
Maintenance/Repair/Motor Pool						SSAM VII.G

Transportation	Priority	Assigned	1	2	3	Comments
Arrange Client's Medical Transport (OMAP 405T and DHS 883)						SSAM VIII-D
Verifies Eligibility for Transportation						
Complete AFS 437/OMAP 409						
Maintain Supply of Bus Tokens/Tickets						
Maintain Client Transportation Files						

Medical	Priority	Assigned	1	2	3	Comments
Managed Care Liaison						
OMAP Contacts						OMAP WG #1
Billing Issues						
Protective Services	Priority	Assigned	1	2	3	Comments
Prepare Reports in Appropriate Format Through Final Approval						
Distribution of Completed Reports- Ombudsman, Public Files, etc.						
Maintain Appropriate Log Sheets						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Confidentiality Issues						
Maintain Files						
Public Disclosure Files						
Oregon ACCESS (Proactive Service Module)						

Adult/Relative Foster Homes	Priority	Assigned	1	2	3	Comments
Update Provider Lists						
Criminal Record Checks/Fingerprinting						
Maintain AFH Public Files						
Maintain Provider Screens						
Process Application/Renewal Paperwork						

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Oregon ACCESS (Inquiry/Case Transfers/Provider Updates/Person Search						Oregon ACCESS Help
Use of e-mail System/Internet						
Update and Distribute Monthly Security Codes						
LTS/Computer Support						
RACF Administration						

Referrals/Resources	Priority	Assigned	1	2	3	Comments
Adult Protective Services						411-020
VRD						
Mental Health						
Developmental Disabilities						

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Veterans						
EPD/EI						
Managed Care Plans ENCC's						
Medical Review Team (Local)						
Presumptive Medicaid Disability Determination Team (Salem)						OSIP Program Manual WG.4
Social Security Administration						
SSI Liaison						GA Program Manual WG.1
Legal Services						
Drug and Alcohol						
Transportation						
Lifeline/OTAP/Link Up America						Worker Guide D.6 461-155-0680
Local Community Resources						
Service Care Manager/PAS						
Estates Administration Unit						Generic Program Elements K

Miscellaneous	Priority	Assigned	1	2	3	Comments
Screening Procedures (If Applicable)						
Office Machine Repair/Maintenance						
Building Maintenance and Janitorial Procedures						
Coordinate Volunteer Training						
Fingerprinting New Employees						
Create/Maintain Labels						
Notary Activities						
Maintain Employee Training Logs						
Statistical Reporting						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Employee Reimbursements						
Authorized Division Representative						