Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance

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Online Guide Transmittal 2017-63
July 28, 2017

To: **Department of Transitional Assistance Staff**

From: **Sarah Stuart, Associate Commissioner for Change Management**

Paul Sutliff, Assistant Commissioner for Field Operations

Re: **Cross Programs – Fast Track Assistance Pilot Expansion**

Overview

In an ongoing effort to improve customer service, and support staff in serving our clients, DTA continues to look for ways to expedite the delivery of benefits and processing of case activities. DTA has implemented the Fast Track Assistance Pilot to improve customer service for clients who are seen in-person. The Fast Track Assistance Pilot is a queuing system intended to:

- alleviate wait times;
- increase efficiency; and
- reinforce our relationship with clients.

Effective July 17, 2017 the Brockton office began participating in the Pilot, joining the Springfield Liberty office.

Purpose

This Online Guide Transmittal:

- updates the offices participating in the Fast Track Assistance Pilot;
- advises staff in the Pilot offices of their responsibilities; and
- obsoletes Online Guide Transmittal 2017-59.

TAOs not yet participating in the pilot must continue to follow established procedures for serving clients in-person.

Stations

Each office groups like services with similar transaction times into as many separate stations as its reception area and staffing capacities allow. Clients are directed to different stations based on their service needs.

Where possible, services are grouped by:

- EBT cards, Income Verifications, and at times assignment to the SNAP In-Person Queue
- scheduled appointments including:
  - applications, recertifications and reevalutions,
  - appeals
  - referrals to non-program staff such as domestic violence specialists, Client Assistance Coordinators, etc.
- SNAP inquiries and updates including:
  - processing an Interim Report with no changes
  - reviewing an application, creating the *Request For Assistance* and scheduling an appointment for a client who wants to apply today but be interviewed later
  - updating an address or phone number
  - issuing a VC-1 as appropriate based on a change or info reported
  - entering a missing pay stub or other verification
- cash inquiries and updates including:
  - issuing a childcare referral
  - updating an address or phone number
  - issuing a VC-1 as appropriate based on a change or info reported
  - entering a missing verification
  - entering ESP attendance and issuing transportation reimbursement

Responsibilities

Greeters

Human Service Assistants (HSAs) and clerks serving as greeters must:

- use the client's completed *DTA Registration Face Sheet* to determine the reason for the visit; and
- direct the client to the appropriate station.

Clerks Staffing a Station

When a greeter refers a client to a station, the clerk staffing the station must:

- complete the service (e.g. print an EBT card or register an appeal); or
- register the client to the In-Person queue.

Clerks must also register clients to be seen in-person when referred from other stations.

SNAP Case Managers Assigned to a Station

When a greeter refers a client to a station, the SNAP case manager staffing the station must:

- use the information on the client's *DTA Registration Face Sheet* to create an Action;
- resolve a simple inquiry or complete a quick case update; or
- determine if a client's inquiry or update will take more than five minutes or requires a more confidential setting. If so, provide the *DTA*

Registration Face Sheet to a clerk who will use it to register the client to the In-Person Queue or the Reception Area Coordinator.

Note: SNAP case managers are not able to register clients on BEACON and are not required to maintain a *Fast Track Assistance Tracking Sheet*. Creating, beginning, and ending Actions- recording the reason and outcome of the client's visit in the Comments sections- is reflected on the Daily Productivity Report, which collects data for the Pilot.

Cash Case Managers Assigned to a Station

When a greeter refers a client with a cash inquiry or update to a station, the cash case manager staffing the station must:

- register and self-assign the client;
- resolve a simple inquiry or complete a quick case update;
- register the client for the assigned or duty case manager if the inquiry cannot be quickly resolved or the case updated;
- call the client's case manager or supervisor to coordinate a date/time to schedule an appointment if the inquiry is expected to take more than five minutes to resolve and the client would prefer not to wait;
- record the client transaction on the *Fast Track Assistance Tracking Sheet*; and
- bundle and submit the day's *Fast Track Assistance Tracking Sheet*(s) to a manager.

Cash Case Managers Not Assigned to a Station

Cash case managers must answer calls from the front desk to confirm available date/times for walk-in clients who would prefer to have an appointment scheduled instead of waiting to see their case manager.

It is important for cash case managers to continue to answer and return calls from clients directly. Every phone interaction with a client could have some effect on his/her need to be seen in-person.

SNAP Supervisors

SNAP supervisors must review and authorize cases requiring secondary signoff of unit members staffing a station.

Cash Supervisors

Cash supervisors must:

- review and authorize the work of unit members staffing a station; and
- answer calls from the front desk to confirm available date/times for walk-in clients requesting an appointment.

Reception Area Coordinators

The Reception Area Coordinator must:

- monitor wait times and clients in the reception area;
- assign staff to stations as appropriate; and
- finish case updates and inquiries escalated from other stations.

Managers

Managers must:

- consolidate data from each month's Daily Productivity Reports and *Fast Track Assistance Tracking Sheets* onto the *Fast Track Assistance*

Statistics Sheet; and

- forward each month's *Fast Track Assistance Statistics Sheet* to the Regional Director.

Forms

The following forms are used for the Pilot:

- *Fast Track Assistance Tracking Sheet*
- *Fast Track Assistance Statistics Sheet*

Obsolete Transmittal

The following Online Guide Transmittal is obsolete:

- Online Guide Transmittal 2017-59

Questions

If you have any policy or procedural questions, after conferring with the appropriate TAO personnel, please have your Systems Information Specialists or TAO management email the DTA Mailbox.

Systems issues should be directed to the Systems Support Help Desk.