PPER Email 2014-35: Additional BPR Best Practices and Reminders

This PPER Email is being issued to provide additional guidance to staff on how to best serve our clients through the new business model.

I have mail that was returned to my local office; do I need to process it?

> No, you do not need to process the returned mail at your TAO. Effective with BEACON Build 46.5 all mail generated has a return address of the EDMC. In the future, no mail should be returned to your TAO. During this transition period you may still receive some returned mail. The unopened mail is to be bundled and secured using an elastic, and shipped to the EDMC with your regular UPS pick-up.

A client has mailed documents to my office instead of the EDMC.

> Treat this mail like a dropped off document. The mail must be reviewed to determine urgency. All documents must be registered and marked as Urgent or Non-Urgent. If Urgent, the document will generate an Action for the In-Person queue or a Notification to the assigned case manager (or On-Demand worker) based on the program type. The case manager who receives the Action or Notification must enter the document in BEACON and send the processed document to the EDMC. Non-urgent documents, must be registered and have a smart coversheet generated through BEACON, before being forwarded, with dropped off documents, to the EDMC. This will generate Actions/Notifications once scanned and indexed.

I received a document for a person other than the grantee. Whose name should be on the cover sheet?

> Using the new BEACON generated smart cover sheet, you must select the person that the document is for. The BEACON generated smart cover sheet will populate the selected person's Agency ID and will ensure proper indexing. If the document is for a household member, the coversheet needs to be for the household member. For example if a grantee sends in a Monthly Report with her spouse's paystubs; the Monthly Report must have a coversheet identifying the grantee; however a separate coversheet must be completed for the spouse to include with his paystubs.

A document that was already scanned is blurry/crooked and I cannot read it. Should I tell the client to resubmit it?

> No. If a document needs to be rescanned please follow the procedures outlined in the Online Guide, found in the BPR Book, Processing Chapter, Requesting That a Document Be Rescanned, page.

Can clerical staff or staff other than the assigned On-Demand, Intake person, or assigned case manager initiate a recertification or an application?

No. Clerical staff must not initiate a recertification or generate an RFA. If a client is applying for benefits in a TAO, they must be registered under the appropriate program type and will be seen by a case manager in the Intake role for cash programs or the first available worker in the In-Person queue for SNAP. Clients who are in office to complete a SNAP recertification will be seen by a case manager assigned to the In-Person queue. Clients who are in office to complete a Cash reevaluation will be seen by their assigned case manager or, in the assigned case manager's absence, by a case manager assigned to the On-Demand queue.

Reminder: Applications for all programs must be processed as far as possible on the date of application. Clients must not be scheduled for a future appointment to complete the application except when the following applies:

- it is the end of the assigned case manager's shift for the day (not the end of their queue shift),
- the client is unable to stay to complete the process, or
- there is an office emergency.

I have an in-person client who needs an EBT card, but the EBT clerk didn't get the notification.

After finishing an in-person Action, if the client needs an EBT card, the case manager must re-register the client to see the EBT clerk. The client will retain their visitor ID number, but if they are not re-registered, the EBT clerk will not know that they are there for a card. Requesting the card in BEACON <u>does not</u> result in a notification to the EBT clerk. Clients must be re-registered once the Action or Notification has been completed. On the Notification or Action Details page, after writing the comment click Save. Then click the Re-Register button, which opens the Registration page. Select the appropriate Reason from the drop-down list (example: EBT). Click Re-Register and the re-registration is complete. Cash case workers can reprint the visitor ID number, with the updated time.

I keep getting interrupted when I am in the phone queue.

It is important that you post your phone queue notice sheet clearly on the outside of your cubicle. This will let support staff know who to check in with and will let other staff know you are not able to speak with them at this time.

I was working in one queue but was switched to another queue while in the middle of an Action.

You can continue to work on the Action that was assigned while in one queue, after you have been assigned to another queue in BEACON. Finish the Action you started. The next Action you request will be from the newly assigned queue if one is available. Unless directed by your manager or supervisor you do not need to change the queue assignment in BEACON.

When a client gets placed, moved or terminated from an EA placement by DHCD, DTA managers would get a notice. Is this changing?

No, TAO managers will continue to get an email notification when a client in their catchment area is placed, moved, or terminated from an EA shelter. Managers should print these letters and direct clerical staff to complete a coversheet before faxing to the EDMC. Once indexed at the EDMC, an Action or Notification will be generated to either the FAW or assigned case manager, and the case updated accordingly.

When do I need to mark myself as Unavailable in BEACON?

You must only mark yourself as Unavailable on BEACON when you are at lunch or in a meeting. Unavailable is not to be selected when seeing a client.

As supervisor where do I find cases that need my review and signoff?

When approving an Action for SNAP workers you must select Get Action. You may request up to five Actions from the supervisor's pool at any time. If you are approving an action for a cash worker you would use the BEACON view.

Does the TAO Staff Configuration page need to be updated each day?

At the start of business each day, the appropriate staff person must update this page. If a staff person is out of the office or is not able to be in the phone queue, a replacement staff person must be assigned in their stead. Additionally, cash workers must be assigned to either Intake or On-Demand.

Clerks must not manually assign clients to cash managers. BEACON is programed to do this for all walk-in clients needing to see a case manager. The exception is for those offices that do not have combined TAFDC-EAEDC case managers as outlined in the previous PPER Email.

An in-person client needs an Income Verification letter. Who should this be assigned to?

The client must be registered in BEACON, but any front office staff-person such as clerical staff or the WAC may provide the letter. Clients must be reminded that they can obtain an income verification letter by calling the Assistance Line.

I have received an Action today of "child turned 18." The Education page does not show that the teen is in school. What do I do?

It is important that when completing an application or recertification, that the Education page is updated accurately for all household members. The case manager should review the Narrative tab to see if the student status has been recently verified and if so, locate the document and update the Education page. If you are not able to confirm this upon review of the case, you must attempt to call the client and ask if client is a student (or otherwise exempt). If the client is reached, send the FS/ET job search form or VC-1 for school verification (or other exemption reason) as appropriate for the dependent. If the client states that the dependent is not in school and is now mandatory SNAP E&T participant, the worker must tell the client that the dependent is mandatory. The client must be told what they need to do to comply and that if they do not, the dependent will be sanctioned and the SNAP benefits will be reduced. This must be included in the Narrative. If the client is not reached, send both with a VC-1 and include instructions that one or the other must be returned by the date due or the dependent will be sanctioned and the SNAP benefits will be reduced

REMINDER: When a client is made FS/ET required, the case manager making this change must schedule a follow up Action with a future due date. Doing this will cause an Action to appear on the date due so that the FAW can initiate the sanction if the job search form is not returned. Make sure to clearly describe the action that needs to be taken in the comments box when creating the Action.