Commonwealth of Massachusetts

Executive Office of Health and Human Services

Department of Transitional Assistance

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Operations Memo 2011- 3
January 18, 2011

To: **Transitional Assistance Office Staff**

From: **Stephanie Brown, Assistant Commissioner for Policy, Program and External Relations**

Re: **TAO Reception Log (e-Log)**

Overview

A new tool has been developed for use in the TAOs to better organize the flow of clients who visit the office, to improve customer service, to gain a better understanding of why individuals visit the TAOs and to allow DTA to better distribute resources to assist those individuals. This tool is called the TAO Reception Log (hereafter referred to as the e-Log).

The e-Log is essentially a data base that allows users access based upon specific security roles assigned. Each security role determines which screens the user is able to access. Security roles are associated with job title and are as follows:

- Case Manager;
- Receptionist;
- Clerk;
- Supervisor; and
- Manager

To access the e-Log, the user can either double click the e-Log desktop icon or single click the e-Log task bar icon. Once the logon is complete, the e-Log will identify the user as active. The e-Log interacts with each user's Outlook account; therefore it is imperative that all users, once logged on to their PC, also log on to Outlook.

Purpose of Memo

This Operations Memo will provide instructions on how to:

- prepare users to access the e-Log database;
- register an existing client into the e-Log database;
- add a new applicant into the e-Log database; and
- access the Job Aids to support the implementation of the e-Log database

Preparations for e-Log Access

Supervisors will be responsible to ensure that their staff follows the steps outlined below to prepare their Outlook account for use with the e-Log. TAO managers or their designee will be responsible for maintaining the e-Log phone book, Staff Data, and Staff Functionality tables.

To prepare for the implementation of the e-Log, users should clear their email to the extent possible by:

- deleting or archiving messages from their Outlook Inbox folder;
- deleting or archiving messages in the Outlook Sent Items folder; and
- right clicking on the Deleted Items folder and clicking Empty "Deleted Items" Folder

At the beginning of the work day, users must log onto their PC using their WELID. Once the logon is complete the user must open Outlook. The e-Log will not run unless the Outlook email account is open. Users who log onto multiple workstations must have their email account loaded onto each PC they use to be able to open and read their email from each PC.

Preparations for e-Log Access (continued)

The IT Site Manager should be contacted for assistance with the Outlook account, if needed.

All e-Log users should:

- delete or archive e-Log notification messages from their Outlook Inbox folder;
- delete or archive e-Log notification messages in the Outlook Sent Items folder; and
- right click on their Deleted Items folder and click Empty "Deleted Items" Folder

Important: Outlook has a specific limitation on message capacity; therefore deleting and/or archiving messages is essential because of the volume of notifications that will be sent and received.

Receptionist and Clerical Support Roles

All users assigned a security role of Receptionist will be prompted to select either a Clerical Support role or Receptionist role from the e-Log main menu. Once the user clicks on the e-Log icon, the main menu screen will display. The Receptionist role allows the user to register applicants, clients and/or vendors who visit the TAO. The Clerical Support role allows the user to create EBT Cards only.

Users with the role of Receptionist have the option of registering clients by swiping the client's EBT card, typing the client's SSN, or by creating a facsimile number for vendors or for clients who do not have their EBT card or do not want to provide their SSN. Upon registering a client an email will be sent to the assigned case manager; therefore it is essential that all staff have their Outlook open.

Note: A facsimile number is automatically generated by the e-Log database. It is not the same as the 999 facsimile numbers DTA uses. The e-Log facsimile number is used only for tracking purposes.

For detailed instructions as they relate to the role of Receptionist, please refer to *DTAOnline/Training/Job Aids/Desk Guides/Reception Log/Receptionist*

For detailed instructions as they relate to the role of Clerical Support please access *DTAOnline/Training/Job Aids/Desk Guides/Reception Log/Clerks (EBT).*

Case Manager Role

All users assigned the role of Case Manager must confirm what they are scheduled to do for the work day. Once they open the e-Log database, they need to review their current functionality under Program Responsibilities. Case managers cannot make changes to their assigned functions; only their assigned supervisor has the capability to make functionality changes.

The following are examples of case manager functions:

- applications;
- case maintenance;
- program responsibilities, i.e., TAFDC, EAEDC, and/or SNAP; and
- duty coverage

When leaving the office for the day, case managers should click the leave office button on the e-Log main menu and follow the prompts. If the case manager has a client(s) in the waiting room who has not been seen, the e-Log will display a message indicating the case manager must notify their supervisor that a client(s) requires reassignment to another case manager.

Please refer to *DTAOnline/Training/Job Aids/Desk Guides/Reception Log/Case Managers* for specific details on the Case Manager role.

Supervisor Role

The user with the role of Supervisor will have the ability to:

- view:
  - active interviews their staff are conducting;
  - client wait list by time;
  - current wait list by case manager;
  - staff availability for the purpose of client interviews; and
  - the phone book, which displays user’s name and telephone number

Supervisor Role (continued)

- reassign a client in the e-Log database to another case manager for the purpose of interviewing;
- modify functions for a case manager for the current day;
- reactivate an interview that was marked Completed in error; and
- update their case manager's availability to interview clients

For more information as it relates to the role of Supervisor, please refer to *DTAOnline/Training/Job Aids/Desk Guides/Reception Log/ Supervisors.*

Manager Role

Managers and/or their designees are responsible for maintaining Office Reference and Staff Data. This must be updated as employees are transferred into or out of the TAO, assigned to a new supervisor or are assigned a new job function.

For more information as it relates to the security role of Manager, please refer to *DTAOnline/Training/Job Aids/Desk Guides/Reception Log /Managers*.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline.