PPER Email 2014-32: BPR Best Practices (Issued 10/30/2014)

On Monday October 27th, the Department launched Business Process Redesign (BPR). In order to assist staff in making as smooth a transition as possible, this PPER Email is being issued to:

- share some of the identified questions; and
- provide solutions, answers and clarifications.

An email regarding systems fixes and enhancements was issued earlier today from MIS. Additional technical issues continue to be addressed and updates will be provided as they are available. It is very important to include the staff person's wel-ID and the case details (preferably the Agency ID) when a ticket is sent in. Please be as clear and detailed as possible when explaining the issue. This will help MIS identify and resolve the issue faster.

The master schedule has me overlapping in more than one queue at the same time or has me in a queue that is earlier or later than my approved flex time, what does it mean?

The overlapping of shifts is deliberate. This ensures that staff can deliver uninterrupted customer service and complete the Action they are working on before moving to the next queue. If your queue is updated while you are in the middle of an Action, finish the Action that is already assigned to you. The next time that you request an Action, you will receive an Action as part of the new queue. Though most tasks will not require 30 minutes, using this amount of time allows for scheduled breaks and other work activities. If you are assigned to a queue with a beginning or end time that is before or after your approved schedule do not worry! The time of the queue shift is standard and you are only expected to be in your queue for the period of time for which your schedule is approved.

I'm unable to "snap" the document preview window so that I can review and enter the information on BEACON at the same time.

Some operating systems (e.g., computer labs) do not have the snapping functionality. To start, minimize the BEACON screen and snap to one side. Then go into the Tools tab located on the upper right of the ECF. Click on the Scanned Document History Enabled icon (looks like a purple scanner). Enter the appropriate search date range and click Search. Select the document you wish to preview and click the Scanned Document Preview Enabled icon (a white square with small black squares). The document can then be snapped to the side opposite of BEACON.

If that does not work try the following: click the Start menu in the bottom left corner of the screen. From the Start Menu select Control Panel. From the Control Panel select Internet Options. In the Internet Options click the Settings button under the section labeled Tabs. The Tabbed Browsing Settings window will open. Under the section titled "When a pop-up is encountered" select the radio button labeled "Always open pop-ups in a new window."

When I open a scanned document I can't read it. It shows up as a blank white page or garbled letters and numbers.

The settings on your computer need to be changed. You can do this by first logging out of BEACON. Then open Internet Explorer and click Tools at the top right of your screen. Select Internet Option. On the General tab, under Browsing History, click on 'Delete…' to bring the Delete Browsing History popup. Make sure 'Temporary Internet files' box is checked and then click Delete. Click OK on the Internet Options. You can then log back into BEACON and should be able to open and view scanned documents.

The MWS icon is not working.

This is deliberate. Since MWS has been fully incorporated into BEACON, there is no need to access MWS separately. To delete the MWS icon from your desktop: right click on the icon, select Delete from the list. A pop-up will ask if you are sure, select yes and the icon will no longer display on your desktop.

In my office we have separate units for TAFDC and EAEDC. When registering an applicant BEACON will not allow us to assign cash applications to case managers by the program type they work in. How can we make sure the client is assigned to a case manager in the appropriate program type?
In TAOs that do not have combined cash programs, the appropriate staff must uncheck EAEDC case mangers under Intake daily and manually assign the applications to the EAEDC case managers on a rotating basis.

When is it ok to dismiss an Action?
An Action must only be dismissed if no action can be taken. For example, you are assigned an in-person application, but the client leaves the office without seeing the case manager. A detailed description of why the Action was dismissed must be entered on the Action Detail page with the "copy to ECF" checkbox checked.

I keep getting a pop-up message that a cold-call must be made, but the previous worker wrote in the Narrative that they did attempt one and an appointment letter was sent.
Prior to BECON Build 46.5, there was no cold-call indicator in BEACON. Therefore, there was no available data to populate this new feature. If, during this transitional time, you see a pop-up you need to review the case Narrative. If a call was previously made or the client has already been interviewed open the Phone page and click the cold-call check box. If no cold-call appears to have been attempted and the client has not yet been interviewed you must make a cold call.

Why do I have to enter a comment when creating an Action?
It is important that everyone reviewing the case has a clear understanding of the actions taken on the case and/or the interaction with the client. For example if a client calls, it is important to indicate what the call was about. "Phone inquiry" is vague and will not help the next person working on the case. However a more detailed comment such as "Client called regarding reduction of SNAP benefits" will provide the next worker with a better understanding.

I'm on the phone queue but BEACON is down, how should I respond to clients?
General questions about policies, office hours or programs can be answered. If the client has a case specific question or is calling for an on-demand appointment, advise them as follows: "Unfortunately, at this time our computer system is down and I am unable to access your case record. I'm sorry for the inconvenience. We expect that this problem should be resolved shortly. Please call back later and the First Available Worker will be able to assist you."
It is also important to remind clients of the services they can take advantage of through the IVR system and to have their EBT card number, SSN or temporary identification number, zip code and year of birth ready.

When should I be logging out of the Cisco software vs. marking myself as Not Ready?
When you are away from your desk it is important to log out by clicking the Logout button and selecting the appropriate reason, such as End of Shift. It is important to click the Logout button whenever you are away from your desk. For example, when taking your lunch break, click the Logout button. Do not simply click Not Ready. If you "X" out of the Cisco software without clicking Logout you will still be logged in. This is extremely important to ensure quality service to clients in the phone queue, and so that it does not appear that you are available to take calls. Not Ready should be used when you are wrapping up an existing Action.

When it was time for me to be in the phone queue I clicked that I was Ready. A few minutes later I realized it changed to Not Ready, why?
It is critical that all staff assigned to the phone queue log in and remain in Ready status. If you miss a call, you will be bumped to the status of Not Ready. You must regularly check to ensure you are marked as Ready unless you are currently in the process of finishing another call or related action.

I received an Action for a recertification, but the form was not signed. What should I do?
You must dismiss the action as Incorrect Data and mail the recertification to the client with the Return Document Notice. The recertification cannot be initiated until a signed recertification form is received. The notice is located at http://170.154.109.59/refrence/curpol/form/14/bpr/returned-document-notice-1014.pdf . A recertification that is signed but not complete is to be processed according to the same procedures as a minimal information application. The same is true for Interim Reports that are signed but incomplete (i.e., client did not check the No Change box but did not answer all the questions). The IR must be initiated but an interview is required.

I have a client asking about domestic violence services. Can I give them the DV Specialist/Coordinator's direct phone number for their area?
Yes! The DV Unit's contact information can be found at http://170.154.109.59/fo/dvs_schedule/dvs_schedule_1014.pdf . Remember clients must not be coded as HLS until they have signed and returned the HLS-1 form. Additionally staff must not give the DV Unit staff's cell phone numbers to clients. These are for staff use only. If there is an emergency and you are unable to reach the DV Unit staff person for a particular area, please consult with your TAO manager.

I received a call from a client requesting information about funeral benefits. What do I do?
Inquiries regarding funeral benefits should be transferred to the Central Eligibility Processing (CEP) Central Burial Unit (CBU). Contact information for can be found at http://dtaonline/fo/central%20burial%20unit%20contact%20info.pdf

I am unable to request a new action. A ticket has been submitted. What should I do until the issue has been resolved?
Case managers who are unable to request processing Actions are able to create Actions and must be reassigned to the phone queue until the ticket has been resolved. These staff can also be assigned (not through BEACON) to in-person Actions as they can access the case via client search.

I have a PI checklist Action for a prison match. I understand that we do not disposition any FIDM matches. Am I correct?
Yes. Policy and procedures related to matches have not changed with BPR. For current procedures regarding matches see Operations Memo 2014-36 Program Integrity (PI) Checklist BEACON Integration – Phase 2, and Other Enhancements to Processing External Agency Matches. Information about processing matches is also available in the Online Guide on the External Agency Matches pages in the Case Maintenance chapter of the SNAP book."
The document type must be changed to FIDMU. Be sure to include a detailed Narrative or Comment before dismissing the Action.

I received a prompt that the client is due for a recertification but I don't see that the recertification form has been returned.

If the signed recertification or IR form has not been returned the recertification must not be initiated. However, it is important to remind the client when it is due and to inquire whether or not they have received the form, have had a change of address or otherwise have questions about completing the recertification/IR form that have prevented them from completing and returning it. To expedite the processing of the recertification when it is returned, clients should be reminded of verification requirements. If all necessary verification is received with the completed recertification, DTA will be able to process the recertification more quickly.