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Field Operations Memo 2000-31A
December 4, 2000

To: Transitional Assistance Office Staff

From: Joyce Sampson, Assistant Commissioner for Field Operations

Re: BEACON Release 2.0 Pilot Activities

Background

Field Operations Memo 2000-31 explained that AU Managers, TAO Supervisors and Implementation Managers would perform a series of casework activities in BEACON Release 2.0. These activities began on Monday, November 13, 2000 and are scheduled to end on Friday, December 22, 2000. Issued with the memo was a series of checklists on the S-drive to be completed by AU Managers, TAO Supervisors and Implementation Managers.

Purpose of Memo

The purpose of this memo is to:

- inform Transitional Assistance Staff that the checklists for AU Managers, TAO Supervisors and Implementation Managers have been revised;

  Note: The Checklists have been changed to capture not only the activities completed but also those activities that AU Managers attempted to complete and those that were not started at all. The original checklists did not record information on activities that AU Managers started but were unable to complete.

- define the terms "completed," "started," and "not started"; and

- introduce the TAO summary form completed by Implementation Managers to capture the TAO total activities "completed," "started" or "not started."

Other than the changes made in this memo, all instructions in Field Operations Memo 2000-31 remain the same.

Definitions   "**Completed**" means that:

- the AU Manager was able to enter the casework activity on BEACON Release 2.0 and authorize (approve or reject) the request on the Interview Wrap-up Authorization window at the AU Manager level; **or**

- the activity is not required for a particular AU Manager (i.e., an NPA AU Manager is not responsible for stopping a vendor payment). On the AU Managers' checklists these activities are indicated by N/A and are grayed out. Therefore, there is no impact when completing the AU Managers' checklists.

Note: Higher levels of authorization (TAO Supervisor, TAO Director/Designee or Comissioner/Designee) are not required for the activity to be considered complete for this exercise.

"**Started**" means that the activity was attempted but was not "completed" due to a problem with the system or any other reason.

"**Not Started**" means that the AU Manager did not have a chance to begin performing the casework activity on BEACON Release 2.0.

AU Managers'   The AU Managers' checklists have been changed to include columns for
Checklists   "completed," "started" and "not started." This allows the AU Manager to select one of the following for each activity:

- "**completed**" for those activities that were authorized on Interview Wrap-up Authorization window at the AU Manager level.

  For each activity that was "completed," the AU Manager would enter the SSN and date. Place an "x" in the box for "completed" and enter the time it took to complete the activity. (For activities that are grayed out and indicated by N/A, nothing needs to be entered in any of the columns on the AU Managers' checklists);

- "**started**" for those activities that the AU Manager attempted to complete but was not able to finish.

  For each activity that was "started," the AU Manager would enter the SSN, date and an "x" in the box for "started"; or

- "**not started**" for those activities the AU Manager did not have time to begin.

  For each activity that was not started, the AU Manager would leave the SSN and date blank and put an "x" in the box for "not started."

TAO Supervisors' Checklists

The TAO Supervisors' checklists have been changed to a Lotus 123 spreadsheet format. The checklists now include columns for "completed," "started" and "not started." The TAO Supervisor will fill in the number "1" for each activity "completed," "started" or "not started" for each AU Manager. For all activities listed N/A on the AU Managers' checklists (i.e., an NPA AU Manager is not responsible for stopping a vendor payment), the TAO Supervisor must place a "1" in the completed column.

The spreadsheet will automatically total these columns and provide a percentage for each activity in the columns on the right of the checklist.

Note: For each row the total number of "completed," "started" or "not started" should equal the number of AU Managers listed on the checklist.

If unfamiliar with Lotus 123, the TAO Supervisor can print the spreadsheet and enter the needed information manually.

Implementation Managers' Forms

Tools to assist Implementation Managers in reporting TAO totals to Central Office include the new TAO Summary form and the Implementation Managers' checklists.

TAO Summary Form

The TAO Summary form has been created to capture the TAO total activities "completed," "started" or "not started." The Implementation Manager will fill in the total of each activity from the TAO Supervisors' checklists. The Implementation Manager must e-mail this form to the Regional Director every Monday beginning December 11, 2000.

Implementation Managers' Checklists

The Implementation Managers' checklists have been revised and changed to a Lotus 123 spreadsheet format. The checklists now include columns for "completed," "started" and "not started." The Implementation Manager will fill in the total number of each activity "completed," "started" or "not started" for each supervisory unit from the TAO Supervisors' checklists. The spreadsheet will automatically total these columns and provide a percentage for each activity in the columns on the right of the checklist.

Note: The narrative sections at the bottom of the Implementation Manager checklists are intended for a brief description of general problems encountered by AU Managers performing the activities on the checklists (i.e., "response time").

The Implementation Managers' checklists are now optional. The Implementation Manager does not need to complete it unless requested by the Regional Director or for his or her own tracking purposes.

Accessing BEACON Release 2.0 Pilot Forms

The revised AU Managers, TAO Supervisors and Implementation Managers' checklists have been reissued on the S-drive. The TAO Summary form has also been issued on the S-Drive. To access the BEACON checklists and the TAO Summary form, TAO staff must:

- click on "Start," go to "Programs" and click on "Windows NT Explorer," or right-click on the My Computer icon and select "Explore" from the dropdown box;

- scroll down to the S-drive and double click on it;

- double click on the folder labeled "BEACON 2 Pilot Forms" and then select the appropriate folder listed below:

  - the AU Manager folder includes:
    - the *AUManag1* file for the *Step I: BEACON Pilot Activities Checklist;*

    - the *AUManag2* file for the *Step II: BEACON Pilot Activities Checklist; and*

    - the *AUManag3* file for the *Step III: BEACON Pilot Activities Checklist.*

  - the Supervisor folder includes:
    - the *Sc1* file for the *Step I: BEACON Pilot Activities Checklist: TAO Supervisor Summary;*

    - the *Sc2* file for the *Step II: BEACON Pilot Activities Checklist: TAO Supervisor Summary;* and

    - the *Sc3* file for the *Step III: BEACON Pilot Activities Checklist: TAO Supervisor Summary.*

  - the Implementation Manager folder includes:
    - the *Summary* file for the *TAO Summary form;*

    - the *Imcl1* file for the *Step I: BEACON Pilot Activities Checklist: Implementation Manager Summary;*

    - the *Imcl2* file for the *Step II: BEACON Pilot Activities Checklist: Implementation Manager Summary;* and

    - the *Imcl3* file for the *Step III: BEACON Pilot Activities Checklist: Implementation Manager Summary.*

Accessing the Checklists (continue)

Reminder: These files are read only. TAO staff must save the document under a new name that is eight characters or less in length. (cc:Mail will only allow file names up to eight characters.)

To save the document, TAO staff must:

- click on the word "File" in the task bar and then click on "Save As" (A popup window will be displayed.);
- click on the down arrow next to the block that reads "Save in" and select the drive and folder you wish to save the document to;
- next to the block that reads "File name," type in the new document name; and
- click on "Save."

Questions

If you have any questions, please have your Implementation Manager contact the BEACON Action Center with your question by e-mail.