

**DPA Work Services Case Manager (EST II)  
On the Job Training Checklist**

**Employee Name:** \_\_\_\_\_

**Office Location:** \_\_\_\_\_

**Supervisor:** \_\_\_\_\_

**Hire Date:** \_\_\_\_\_

Topic	Details	Date Topic Discussed	OJT Trainer	Comments
<b>Administrative</b>				
1	Tour & Introductions	Tour of office, introduction to team, sections, job center partners.		
2	New Employee Orientation	New hire paperwork completed and submitted, systems access requests, DHSS orientation; DPA Orientation (DPAweb); employee page on Alaska.Gov, employee HR call center, labor relations and union steward contact information; salary schedule. <a href="http://dpaweb.hss.state.ak.us/">http://dpaweb.hss.state.ak.us/</a> <a href="https://go.dhss.ak.local/intranet/home/Pages/Home.aspx">https://go.dhss.ak.local/intranet/home/Pages/Home.aspx</a>		
3	Work Schedule, Breaks, & Lunch	Detail specific to employee. Overtime/non-exempt policy.		
4	Front Door, Office & Cabinet Keys	Issue keys and record on log if applicable. Report lost keys to supervisor immediately.		
5	Timesheets & Personal/Sick Leave	Forms, coding, due dates, leave approval; call in procedure.		
6	Performance Evaluations	Interim; yearly; copy of form; probation discussion.		
7	Business Cards	Order thru <a href="http://dpaweb.hss.state.ak.us/training/businesscard/">http://dpaweb.hss.state.ak.us/training/businesscard/</a>		
8	Phones	Greeting, voice mail, transferring calls, personal calls, long distance, professional etiquette, returning calls within 8 business hours.		
9	Supplies, Mail, Front Counter	Initial office set-up and how/who to order additional supplies. Mailing station, postage, EIS notice requests, copy of all letters mailed to client placed in hard copy file and a client note. Leaving documents for clients at front counter & collecting from WS lobby box (if applicable).		
10	Weekly Staff Meetings	Frequency, location, & how to prepare.		
11	Organizational Chart	Provide copy of most recent version. Review roles of DPA Work Services, Field Services, CSQA, WSTA, SD&T, Policy, EOMs, RMs, chiefs, & director.		
12	Emergency Procedures	Local office emergency manual.		
<b>Computer Systems</b>				
13	Computer	DHSS logon to computer and Outlook; have WS Shared drive and G drive mapped; set default printers. Set up tabs in Internet Explorer.		
14	Outlook	Review email protocol and 8 business hour response time.		
15	ALEXsys	DOLWD server; how to change password; look up services & referrals; work activity verification; email <a href="mailto:dol.help@alaska.gov">dol.help@alaska.gov</a>		
16	Luminist	Review Luminist link, use and login.		
17	EIS	Search for client; access CLIN, NOHS, TAIH, FSIH, GRIN, WORK, WOSA, JOMO; print CLPM/CAP2; issue J notice. Helpdesk procedure: <a href="mailto:eishelp@alaska.gov">eishelp@alaska.gov</a>		

**DPA Work Services Case Manager (EST II)  
On the Job Training Checklist**

**Employee Name:** \_\_\_\_\_

**Office Location:** \_\_\_\_\_

**Supervisor:** \_\_\_\_\_

**Hire Date:** \_\_\_\_\_

Topic	Details	Date Topic Discussed	OJT Trainer	Comments
18	CMS Search for client; change CARC; set case manager or ET alert; add work activities (actual) & wage; add CLNO, record observations of behavior and facts, not opinions; create and update FSSP; when to use CANO; initialize month. eishelp@alaska.gov			
19	SNAP Appointments Access own calendar and coworkers calendars; add appointment; add busy time; delete; change.			
20	The Work Number www.theworknumber.com -- verification system for client's income that can be used for work activity verification.			
21	SAM Unemployment Insurance wage verification by SSN; can be used for work history.			
22	Internet Explorer Set up tabs for CMS, Work Services, DPAWeb, ALEXsys & State of Alaska			
23	JAS/EIS Support Service System Search for local & statewide vendor; client name; authorization to vendor/client/file; send direct to office; use F6 & printer ID; look at payment history.			

**Role, Expectations & Confidentiality**

24	Position Description Review position description together.			
25	Case Management Expectations Review case management expectations document together and sign. Copy provided to employee and copy to working file.			
26	DPA Professional Standards Review professional standards document together and sign. Copy provided to employee and copy to working file.			
27	Confidentiality Protecting sensitive information at all times. Safeguarding information at desk, during phone calls, email, etc. How to handle external requests of information. General conduct outside of work hours. Releases of information.			
28	HIPAA Training Mandatory training, DHSS website: <a href="https://hsstraining.alaska.gov/login/index.php">https://hsstraining.alaska.gov/login/index.php</a>			

**Measurements, Outcomes, Quality & Training**

29	Caseload Participation & Engagement Half of all adults in the program are participating in a federally approved core work activity. Separately, three quarters of all families with two parents in the home are participating in a federally approved core work activity.			
30	Client Outcomes Varying percentage thresholds depending on location. Measured outcomes include cases that close ATAP with earned income; gaining new earned income within 90 days of referral to DPAWS; closed ATAP cases that remain closed after six months; number of clients in subsidized employment or volunteering.			
31	Measurement Statistics & Tools Review criteria for denominator/numerator in all performance measures. Review Performance by Case Manager report on DPAWeb. Review Universal Statistics Report on DPAWeb. Review each of the six documents on the DPA Work Services Performance Measures website under the "documentation" section.			

**DPA Work Services Case Manager (EST II)  
On the Job Training Checklist**

**Employee Name:** \_\_\_\_\_

**Office Location:** \_\_\_\_\_

**Supervisor:** \_\_\_\_\_

**Hire Date:** \_\_\_\_\_

Topic	Details	Date Topic Discussed	OJT Trainer	Comments
32	Quality Assurance Review supervisor comprehensive case review criteria and form, supervisor target case review criteria and form, and DPAWS statewide case review criteria and form. Introduction to statewide case reviewer. Discuss 80% monthly requirement.			
33	Training Discuss ongoing training through OJT and 1-topic sessions (eff. July 2019). How to request additional training through supervisor. Support internal offerings through DoP and external free online webinars. Acknowledge that any staff who express desire to facilitate a team development topic of their choice will be supported by management.			

**Frequently Used Case Management Terms & Tools**

34	TANF, TA, ATAP, Cash Terms used to describe cash assistance paid to a household.			
35	Types and Status of Temporary Assistance Cases 1 parent HH, 2P, 3rd Tri, ANI, Tribal TANF, ineligible alien, teen parent, step parent. Open, Closed, denied, pending, refused cash.			
36	In the Month, For the Month Federal participation rate denominator criteria starts with whether or not the TANF payment was paid to the client in the month that it was intended for. Example is receiving March benefits in March versus receiving March benefits in April.			
37	Caseload Report Weekly report printed from Luminist. Review all column headings; 2P; case status; work activities; exemption & penalty codes. Best practices for report usage. Data dictionary.			
38	FSSP Development All adults need a current Family Self-Sufficiency Plan. Agreed upon goals, steps, dates, times; specific schedule assigning specific activities, sign it in CMS. No lapse in time; schedule update meeting in advance of FSSP expiration.			
39	Employability Assessment Use assessment tool to guide discussion; time limits, work requirements, penalties. Use client note format and document in all sections. Use open-ended questions.			
40	Supportive Services Menu of services in manual; need and eligibility; document justification; use budget to assess situation and JAS authorization. Supervisor approval for unconventional payments or high dollar amount. Direct pay documentation requirement.			
41	Childcare Requests PASS I/II; CC3 in file and update frequency; full month & part month; complete request for authorization correctly in CMS; hard copy of all authorizations in file.			
42	Exemptions vs. Good Cause BA 12 month lifetime limit; CA; CD; IC; PM; TA10 requirement vs. doctor note. Good cause very different than exemptions; typically temporary, not excluded from rates.			
43	Penalties 40%, 75% & 100%; good cause, due diligence, date of intent; home visit, alternate activity; WA, SS and CS.			
44	Home Visits As needed to engage, assess, meet in client's surroundings. Necessary to progress penalty beyond 40%. Safety of children documented. Visit logistics, state vehicle only, safety of staff members; buddy system; do not attempt unannounced visit if signage prohibits visitors.			

**DPA Work Services Case Manager (EST II)  
On the Job Training Checklist**

**Employee Name:** \_\_\_\_\_

**Office Location:** \_\_\_\_\_

**Supervisor:** \_\_\_\_\_

**Hire Date:** \_\_\_\_\_

Topic	Details	Date Topic Discussed	OJT Trainer	Comments
45	Client Contact	Monthly or more frequent contact to follow-up on assigned activities; FSSP review; update FSSP as situation changes; debrief work search; reminders. Promote appropriate usage of communication (i.e. phone, email, in-person, mail, fax, text).		
46	Communication Plan	Simple plan with every client how communication will take place. When, where, how. Phone, email, text, in-person. Pictures. Use technology. Be open.		
47	Monthly Work Activity Verification	Every month of TA eligibility requires a work activity code entered in CMS. Case manager's responsibility to get verification of activities completed. Use theworknumber.com, timesheets, etc. 4.33 conversion; calculations; CLNO. Countable hours; data entry deadline.		
48	Reporting Changes	How/where to report changes. Provide to eligibility. Printing CLPM/CAP2; entering CLNO.		
49	Family Progress Reports (FPR)	Family Progress Reports; forms to use; when they are due; how to track.		
50	Community Resource Guide	211; print current community resource guide; know where/how to refer/follow up. Use co-workers to leverage knowledge and relationships.		
51	Extension of Benefits Beyond 60 months	Review policies; forms, method, local process.		
52	Closing Work screen, Exit Summary, Post TA Eligibility	When to close CMS work screen and what happens; exit summary CLNO format; post TA services and why.		
53	Job Center Workshops	CR101, proficiency tests, resource room, DOL front counter, resumes, interviewing.		
54	Career Support & Training	Overview of services; how to refer.		
55	Fidelity Bonding	No cost to employers; insurance policy for potential/perceived loss. Felon list.		
56	WOTC	Familiar with benefit to employer and paperwork required.		
57	Fraud Referrals	Typically the exception to the rule. Know when appropriate. How to refer.		
58	Mandatory Reporter	To OCS for child abuse (review policies). Notify management via email immediately.		
59	Case File Format	Six part files, sections, labels, open, closed, archiving.		
60	Fair Hearing	How a client files; what happens; continued benefits; participation in hearing.		

