Division of Public Assistance

Statewide Process Management Guide

Standard Operating Procedures for Successful Implementation

Revised January 3, 2012

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I. INTRODUCTION

This Process Management Guide provides staff with an overview of their role in process management, the duties and responsibilities associated with their role, and instructions on performing these duties to ensure adequate staffing, resources, and quality of work.

In process management, work is divided by specific functions. Depending on the job class, staff are initially assigned to a specific area and subsequently rotated into other functional areas. The roles are first classified as either clerical or eligibility and then further divided by functions assigned to each job class. The instructions outlined in this procedure will assist staff in understanding the responsibilities and tasks required in each functional area allowing them to work more efficiently, maintain flexibility and accountability in their work, and meet accuracy requirements.

II. CLERICAL

Clerical staff, or office assistants, will perform a variety of functions in support of administrative and program operations and work flow processes. These functions include handling the following:

- Walk-in Customers
- Incoming Calls
- Incoming Mail
- Outgoing Mail
- File Control
- Birth verifications and requests
- Supplies
- Machines and Equipment
- End of the day duties
- Application registration

Specific duties assigned to each function are outlined in the following sections.

A. WALK-IN CUSTOMERS

Office assistants assigned as navigators are responsible for serving walk-in customers and performing the duty of screening applicants. Navigators are in charge of the flow of the lobby, greeting customers as they arrive in the office, and asking specific questions to identify how to quickly meet their needs.

1. CUSTOMER CHECK-IN

- Greet all clients entering the lobby area and ask them how they may be helped.
- Direct clients to appropriate resources which include:
    - The resource area for applications and other forms
    - Eligibility technicians for questions or verification (navigators have control over the distribution of numbers for clients needing to see the Question and Answer unit)
    - A drop box if the client cannot stay to see the Q&A ET to review verification.

2. QUESTIONS TO ASK CLIENTS TO PROVIDE ASSISTANCE

a. Are you here to apply for new benefits or to recertify your case?

1. If the client wants to apply for benefits or to recertify their case:

    - Ask if they can stay for an interview today or if they have a scheduled appointment.

    - Check the CLPM for the case history and print it if applicable.

2. If the client is in the office for a scheduled appointment:

    - Update the appointment and enter the client's name and case number.

    - Update the color of the appointment slot to show that the client is waiting in the lobby.

    Note: Offices use a designated color code for each appointment situation.

3. If the client needs an interview:

    - Ask them if they would prefer to wait for an interview or be called for a phone interview the next business day by a specified time.

    Note: Offices have the option of designating optimal times to determine appointments based on local staffing and workflow considerations.

    - Give the client an application and packet for the appropriate programs or direct them to the resource wall.

    Note: The resource wall must clearly identify for the client exactly what application, forms, etc., is needed

4. If the client is available and prefers to wait for a face-to-face interview:

    - Instruct the client to complete the application form and return it to the navigator once it is completed.

    - The navigator will then review the application and conduct the following:

- Ensure the application is signed.
- Accept and date-stamp the application and paperwork.
- Get a phone number.
- Copy the client's ID; certify the original identification.
- Enter the client's information in the scheduling system (client's name and case number) and color code for the interview type.

Note: Offices use a designated color code for each appointment situation.

- Tear off the information pages of the Application for Services (including Rights and Responsibilities) and give them to client.
- Register the application if time allows.

5. If the client cannot stay for a face-to-face interview and prefers a phone interview

- Instruct the client to complete the application form and return it to the navigator once it is completed.
- The navigator will then review the application and conduct the following:
  - Ensure application is signed.
  - Accept and date-stamp the application and paperwork.
  - Get a phone number.
  - Copy the client's ID; certify that it is an original identification.
  - Enter the client's information in the scheduling system (client's name and case number) and color code for the interview type.

Note: Offices use a designated color code for each appointment situation.

- Tear off the information pages of the Application for Services (including Rights and Responsibilities) and give the documents to the client.

- Inform the client that they will be contacted at the designated time for a telephone interview and stress the importance of their availability when the ET calls.

- If time allows, register the application and write a CANO stating that the applicant was given a copy of the letter that informs them of their interview schedule including the specific date and time.

CANO Example:
Appointment schedule was given to applicant. ET will call applicant for an interview scheduled on 5/15 by 3:00 pm.

b. Are you here to drop off information or ask a question about your case?

1. If the client is dropping off information:

   - Ask them if they prefer to put it in the drop box or talk with an ET about the information.

   - Direct the client to the drop box if they prefer.

   Note: Smaller offices may opt to not use a drop box.

2. If the client wants to talk with an ET:

   - Ask the client to have a seat and tell them an ET will be with them as soon as possible.

   Note: Larger offices may opt to use a numbering system.

c. Are you here to report a change in your situation?

If the client is reporting a change in their situation, ask them if they would like to have a seat, and let them know they will be called shortly.

Note: Larger offices may opt to use a numbering system.

3. LOBBY FLOW

Office assistants are responsible for managing the flow of clients through the lobby. This function includes:

- Ensuring the lobby is stocked with all commonly used forms, brochures, and other necessary documents
- Assisting clients in the lobby as needed
- Monitoring lobby traffic regularly
- Notifying the Daily Process Manager when a bottleneck occurs or if a client has been waiting longer than 30 minutes

4. BACK-UP SUPPORT TO OTHER FUNCTIONAL UNIT

Office assistants will provide backup support to the Q&A unit whenever possible. Back-up support functions include:

- Printing Medicaid field coupons
- Accepting and routing income verifications
- Accepting and routing address verifications
- Accepting and routing case verifications
- Issuing EBT cards
- Copying and date stamping original documents
- Answering any additional questions from clients

B. INCOMING CALLS

1. ANSWERING CALLS

- Answer all calls routed to the clerical unit.

Note: Refer to the instructions below for switchboard programming.

- Assist all callers and route calls appropriately if you are unable to resolve a client's request.

2. SWITCHBOARD PROGRAMMING

Before calls are routed to a clerical switchboard operator, calls are screened by the automated answering system. The automated answering system asks callers choose from the following options to route the call to the appropriate functional team:

If the client:

- Needs to apply for benefits - call is routed to the Intake team.
- Has an open case and need to report new information – call is routed to the Report of Change team
- Has an open case and need to interview – call is routed to the Maintenance Interview team.
- Is calling about a pended case – call is routed to the Pend team.
- Is calling to provide verification for a case – call is routed to the Pend team.
- Has question(s) about a case – call is routed to the Question and Answer team.
- Has other questions or information – call is routed back to the main switchboard.

Note: Not all offices have a phone tree answering system.

C. INCOMING MAIL

1. MAIL PICK- UP

- Pick-up mail from drop box, mail, pouches, and faxes throughout the day.

Note: Offices will establish time for mail pick-up.

2. MAIL SORTING

a. Open each piece of mail and date stamp.

b. Sort the mail and attach a CLPM and CAP2 and forward to the appropriate unit.

- Forward all recertification/reviews to the Maintenance Interview or Report of Change units.
    - If the ADDR shows an interview is due, or if it is not indicated on the ADDR - carc the case to the Maintenance Interview unit.
    - If an interview is not due, forward it to the Report of Change unit.
- Forward applications to the Intake unit.
- Forward reports of change and other documents to either the Report of Change or Pend unit.

Note: Ensure applications and recertification/reviews are registered before forwarding these documents to the appropriate unit. Refer to section II (J) for more information about registering applications and recertification/reviews.

D. OUTGOING MAIL

1. MAIL PREPARATION AND DELIVERY

a. Prepare outgoing mail. Attach postage or a routing slip.

b. Sort the mail and place in the appropriate mail station.

c. Deliver mail to the appropriate unit, office, or region.

d. Attach a route slip and/or CLPM and CAP2.

2. STOCKING POSTAGE SUPPLIES

Stock postage supplies daily including envelopes, routing slips, etc.

E. FILE CONTROL

1. FILING

Clerical staff will maintain all files in the Central Filing unit which includes all active and closed cases.

2. CREATING TEMPORARY FILES

A temporary file is created when another file exists (that is not archived) within DPA. Offices usually create a temporary file when the original file has been requested from another office and the file is still in transit.

a. Office assistants will create temporary files in folders that will be clearly identified as temporary files. The color or type of folder used for temporary files will be designated by region.

b. All temporary files will be maintained in the designated folder and combined with the original file once it is returned or located.

- If the case is denied, the documentation will be placed in the type of folder designated by the region for denied cases.
- If the case is new and pended it will be placed in the type of folder designated by the region to signal that no other file exists.

c. Offices must also the type of folder designated by their region when sending verification/information to an existing file located within the region. These items must be clearly marked "combine with file."

3. MONITORING FILE REQUESTS

a. Monitor intake and maintenance unit interview schedules on the scheduling system and pull files immediately. Deliver files to the appropriate staging area.

b. Monitor e-mail for additional file request that do not appear on the scheduling system. Deliver files to requesting ETs within 10 minutes.

c. If the file is out of the office or delayed for some reason, notify the requesting ET.

4. HANDLING FILE REQUESTS WITHIN THE OFFICE

Note: some of the following procedures may not apply in smaller offices where clerical support is limited and eligibility staff pulls the file from Central Filing unit.

a. Print the CLPM and CAP2.

b. Pull the file immediately.

c. Check for duplicate eligibility or case management files, if available.

d. Change the CARC to the requesting unit.

e. Time Stamp the CLPM.

f. Place the CLPM in "Files Out" x-rack (filed in alphabetical order).

g. Deliver the file(s) to the requesting ET within 10 minutes. *Refer to Addendum B for requesting file(s) from outside the office but within the region.*

5. HANDLING FILE REQUESTS FROM OUTSIDE THE REGION

a. Pull the file immediately.

b. Check for duplicate file or case management file.

c. Deliver the file to an ET III for review. The reviewer will make appropriate corrections and take necessary actions and return the file to the control clerk within one business day.

d. The control clerk will transfer the file to the requesting region. *Refer to Administrative Manual section 103-7 for additional information on transferring files.*

6. COLLECTING FILES

Note: The following procedures may not apply in smaller offices where clerical support is limited and eligibility staff returns the file to the Central Filing unit.

a. ETs will return all files to the central fling area by the end of each day. In addition, office assistants will make regular sweeps of the office to pick up files as assigned.

b. When files are returned to the Central Filing unit, OAs will pull the matching CLPM from the “Files Out” x-rack and time stamp the CLPM.

c. After matching the file with the CLPM, place the case file in the appropriate cabinet.

d. Locate the files for all CLPMs remaining in the “Files Out” x-rack at the end of the day (i.e., from the Intake staging, supervisor, etc.). If the file is not located, the OA will note this on the CLPM. Move the CLPM to the slot for next day anticipating the file return.

e. Any missing files based on CLPMs remaining will be reported to the clerical supervisor for further action.

f. ETs or leadership staff may not have files in their office unless they are working on that specific case. ETs and leadership staff will ensure all case files are available for clerical to collect and return to Central Files at the end of the day with the exception of files pulled and located in the staging area for next day’s work.

7. CREATING NEW FILES AND FILE VOLUMES

a. OAs will create new files and divide large existing files into volumes.

Note: Some offices may assign ETs to do this task

b. ETs are responsible for purging the file they are working on, if necessary. Files at application and recertification/review are required to be purged. *Refer to Administrative Procedures MS 103-1E for instructions on purging files.*

c. ETs will identify files needing a volume created; these files will be given to the Clerical unit. OAs will create a new file and send the old volume to the control clerk. *Refer to Administrative Procedures MS 103-1F for instructions on creating file volumes.*

d. OAs will create new files at the request of the ET. ETs are responsible to clasp all necessary documents together for the Clerical unit. *Refer to Administrative Procedures MS 103-1 for instructions on organizing the file.*

Note: To create new files, utilize recycled files first. If recycled files are not available, clerical may order new file folders.

8. PULLING CLOSED CASES FROM OPEN FILE CABINETS

The Clerical unit will utilize the EIS caseload report to identify closed files monthly.

a. Pull closed files and move them to the closed file area.

b. Closed files are organized by closure month, then by alphabetical order.

9. ARCHIVING FILES

The Clerical unit is responsible for pulling and maintaining closed files and pulling files that are due to be archived according to the following procedures:

a. Pull files that have been closed for one year.

b. Prepare files in boxes and inventory.

c. Complete data entry and paperwork required for sending files to Archives. *Refer to Administrative Procedures MS 103-6 for instruction on sending files to Archives.*

d. Schedule pick-up.

F. BIRTH VERIFICATIONS AND REQUESTS

The clerical unit will assist in obtaining copies of in-state and out-of-state birth certificates.

1. PROCESSING IN-STATE BIRTH VERIFICATION AND REQUESTS

a. ETs will e-mail their in-state request to the appropriate site contact. The in-state request must include the following information:
   - Parents' names
   - Child's name and birth date
   - Case number

b. The clerical unit will return in-state birth verifications to the requesting unit within one business day.

2. PROCESSING OUT-OF-STATE BIRTH VERIFICATION AND REQUESTS

a. Out-of-state birth requests will be submitted to the regional office for processing.

   Note: Some regions have a regional office procedure available. Contact the supervisor for a copy.

G. SUPPLIES

The clerical unit will identify general office supply needs. This will be done as needed. Supply requests will be submitted to the regional office.

1. **PROCESSING SUPPLY REQUESTS**

   a. The designated office assistant will identify supply needs by doing an inventory of the supply cabinets and checking the supply list on the cabinet door.

   b. The designated office assistant will submit the order to their site manager for approval. Once approved, the supply request is submitted to the regional office.

   c. The regional office will review approved items and submit the supply order to the appropriate vendor.

2. **RECONCILING SUPPLY ORDER UPON DELIVERY**

   When an order arrives, the designated office assistant will:

   a. Reconcile the order with the packing slip to ensure all ordered items were delivered and contact **the regional office immediately** if any items are missing.

   b. Forward packing slip(s) to the regional office promptly.

   c. Restock the supply cabinets.

H. MACHINES AND EQUIPMENT

Clerical will ensure all building machines and equipment are stocked daily which includes copier and fax machines. The duties include:

- Checking the copier and fax machines daily for paper in trays and replenishing when necessary

- Checking the copier and fax machines daily for print quality and replacing toner or drum when necessary

- Conducting a copier reading once a month and sending it to the Regional office if required

I. END OF DAY DUTIES

Clerical will perform duties at the end of the day to ensure that the lobby and clerical area is in order. The duties include:

- Ensuring lobby windows are closed (if applicable)
- Ensuring the drop box is empty
- Date stamping any remaining unstamped documents
- Turning off all clerical computers
- Cleaning tables and counters
- Restocking any forms needed in the lobby area

J. APPLICATION AND RECERTIFICATION/REVIEW REGISTRATION

Registering applications and recertification/reviews will be the primary responsibility of the Clerical unit. However, ETs are still expected to add any new program to an existing registration in APMA (as long as that ET did not register the existing program).

Note: The Clerical unit may be unable to register all applications and recertification/reviews at all times. This must not delay the process of interviewing clients. Refer to each specific functional unit's section for additional information about the ETs responsibility in registering applications and recertification/reviews.

1. CLERICAL DUTIES WHEN REGISTERING AN APPLICATION OR RECERTIFICATION/REVIEW

a. Register the application or recertification/review as required.

Note: When registering application, clerical staff will register all household members listed on the application.

b. Write a CANO stating that the applicant was given a copy of the letter that informs them of the time and date of their interview.

CANO Example:
Appointment schedule was given to applicant. ET will call applicant for an interview scheduled on 5/15 by 3:00 pm.

c. Print a CLPM and CAP2.

d. Affix the printout as a cover sheet to all applications and recertification.

e. Place the registered applications in the identified basket in the staging area for the appropriate unit (i.e., Intake staging area).

   Note: Due to the volume and immediate need for new application registration daily, an office assistant will be located and assigned to the Intake staging area. The primary focus of this office assistant will be to register all intake applications waiting for an interview and any other applications which are not yet registered.

III. ELIGIBILITY

Eligibility staff is assigned to specific functional areas of eligibility to ensure efficient and accurate delivery of benefits. The functional areas are:

- Question and Answer
- Intake
- Pend
- Maintenance Interview
- Report of Change

A. QUESTION AND ANSWER (Q&A)

The navigator will direct clients with questions to the Q&A desk. Staff assigned to the Q&A function will assist clients in-person or over the phone with questions about their case.

If a client is in-person, the navigator will provide the client a number for the Q&A desk queue. Q&A staff will utilize this number system to ensure fair and efficient service to customers.

Note: Smaller offices do not have to utilize a numbering system.

When Q&A ETs are assisting clients, they will not pull and assist another client until they have reviewed all information provided. This ensures the information the client provided is complete and all necessary actions are taken.

The duties of eligibility staff assigned to Q&A are outlined as follows:

1. PROVIDING ANSWERS AND REFERRALS

a. Answer client questions and refer to community resources if necessary.

b. Direct clients to the appropriate application for services.

c. Research and identify client questions regarding their case.

d. Identify the next steps for the client, or resolve the issue.

2. DETERMINING IF AN INTERVIEW IS NEEDED

Note: Always check for expedite Food Stamp eligibility and the client's signature on the application.

a. If an interview is needed, determine if the client can be seen immediately.

b. If the client can be seen immediately, do the following:

- Contact the Intake or Maintenance Interview unit using the scheduling system
- Ensure [the] application or recertification/review is complete

- Register [the] completed application and place it in the “waiting for an interview” basket
- Attach a CLPM and CAP2 to the application

Note: offices will have a specific procedure for handling a procedure when a client’s case it carc’d to another office and the client does not have a phone number where they can be contacted for an interview by that office (i.e., the client is at the Gambell office and the case is assigned to the Mat-Su office). Refer to the Addendum B for additional information.

c. If the client cannot be seen immediately, do the following :

- Determine if the client has a good contact phone number
- Schedule a telephone appointment and identify the programs for which the client is applying
- Write a CANO stating that the applicant was given a copy of the letter that informs them of their scheduled interview, which must include the specific date and time

  CANO example:

  Appointment schedule was given to applicant. ET will call applicant for an interview scheduled on 5/15 by 3:00 pm.

- Register the application
- Obtain a certified copy of the client’s ID and attach it to the application

  Note: whenever possible, if a client’s case is assigned to another office or region and an interview is due, register the application or recertification and send it to the assigned office or region. Advise the client that an ET will contact them for an interview once the paperwork is received in the assigned site.

3. DETERMINING IF AN INTERVIEW IS NOT REQUIRED

a. If an interview is not required:

- Ensure the application or recertification/review is complete

- Register the completed application
- Ensure the client has provided a good contact phone number
- Obtain a certified copy of the client's ID and attach it to the application
- Review all verifications provided by the client to ensure they are accurate and complete
- Attach a CLPM and CAP2 to the application
- Forward the application with any accompanying paperwork to ROC unit

4. REVIEWING DOCUMENTS AND VERIFICATION SUBMITTED BY CLIENTS

Note: Refer to Addendum B for handling information received for another office.

a. Review and date stamp all documents that clients are submitting or returning as verification.

b. Review the case information and determine if the documents meet the needed requirements.

c. Document the information in a CANO and process the case if all required information is available.

d. If the information is incomplete and the ET is unable to process the case:

- Date-stamp the documents.
- Attach a CLPM and CAP2.
- Forward the documents to the appropriate unit.
- If additional information is necessary, remind the client of what information is needed and the due date.

e. If the original pend notice was incomplete and additional information is needed:

- Re-pend the case and request the additional information.
- Send a pend notice to the client.
- Make a copy of the pend notice for the Pend unit.
- Carc the case to the appropriate CARC.
- Place necessary paperwork in the appropriate basket.

f. Ensure pend notices are reviewed by a supervisor or leadworker.

- Place all pend notices in the area designated by the supervisor or lead worker.
- The supervisor or leadworker will review all pend notices throughout the day to ensure only required verification is being requested. This task must be completed prior to forwarding the documents to the next functional team.
- The supervisor or lead worker will place the correct pend notices in the Pend unit's basket for delivery and return incorrect notices to the ET for immediate correction before forwarding to the Pend unit.

Note: The review will continue for a minimum of two weeks or until necessary skill is demonstrated by the ET.

5. ASSISTING CLIENTS WITH OTHER REQUESTS

a. Provide printouts of client information as requested by clients.

b. Reauthorize benefits that have been de-authorized in error. A case note entry is necessary for this action.

c. Issue DE-25 ME coupons when necessary. Review EIS to determine if client is eligible for a DE-25 coupon (an IA interview must have been conducted before a DE-25 coupon may be issued).

d. If the case is denied or closed and there are other benefits that are set to close at the end of the month, the ET will change the CARC to the appropriate CARC.

e. Issue Quest cards and answer questions.

f. Verify original documents for citizenship requirements:

- View the original documents.
- Stamp copies as: *Copy Made from Original*.
- Mark the date.
- Initial the copy.

g. Hand out and explain necessary forms to clients and stress the importance of returning all information right away.

h. Document any changes the client reports and process it to the fullest extent. Should the case require pending or if a pended case continues:

- Document this information in a CANO.
- Inform the client of the case status.
- If unable to process the change, set an appropriate alert for the Pend unit.

i. Handle requests received from Work Services partner agencies to impose penalties on TA cases. *Refer to Addendum D – Work Services/Case Management Process.*

B. INTAKE

Eligibility technicians assigned to the Intake unit are responsible for ensuring all applications are processed and eligibility determinations are made in an expeditious manner. The navigator will enter the client's name in the scheduling system for the Intake unit once the client has completed their application. The Intake unit is responsible for monitoring the scheduling system to ensure clients are interviewed immediately.

The work schedules of ETs assigned to the Intake unit will be staggered to ensure coverage of interviews during office hours and to accommodate client needs outside regular business hours.

The duties of staff assigned to the Intake unit are outlined below.

1. MANAGING THE INTERVIEW SCHEDULE

a. ETs will utilize one schedule titled "Intake Interview Unit" for walk-in interviews and a separate schedule for interviews requiring a scheduled appointment.

   Note: Some offices use Appointment-plus for their scheduling system. Offices in areas with low bandwidth may not be able to, and will need to devise a scheduling system using Outlook, Excel or other programs. Offices using Appointment-plus will dedicate one column to Intake interviews and a separate column to interviews requiring a scheduled appointment.

b. Each ET will maintain their individual calendars. ETs will move an existing appointment from the unit calendar to their individual calendar as soon as the client is in their office or once the client is reached by telephone. The ET will ensure all fields are updated and accurate (time, program, intake, add-on, etc.).

c. Navigators and ETs will enter the names of clients in sequential order (first come, first served).

d. The navigator will enter a client's information and requested programs on the interviewing team calendar while the client is waiting in the lobby.

e. ETs in the Intake unit will handle phone calls as assigned. When a call is received, the designated ET will pull the client's application and double check the phone or contact numbers.

f. If the client needs a telephonic interview, the ET will enter the client's information and program requested in the unit calendar. The ET will inform the client that someone will call them within a designated amount of time. Review with the client the phone or contact numbers where they can be reached and stress the importance of being available when the ET calls.

g. If the client wants to schedule an appointment at a later date, pull the application. Review phone contact numbers with the client and stress the importance of being available when the ET calls. Enter this information in the unit calendar for scheduled appointments on the designated day.

2. REVIEWING AND REGISTERING THE APPLICATION

a. All applications will be registered by the Clerical unit whenever possible. In instances when the Clerical unit is unable to register, the ET will register the application on EIS. When this situation occurs, the ET is not permitted to authorize benefits for the case once it is ready to process. However, ETs are allowed to use APMA to add a program to a registration if they did not register the existing program(s).

b. The ET assigned to the application will review the application and DPA programs with the client.

  - The CANO and all EIS screens must be completed by the initial ET.
  - The ready-to-work application will be submitted to a designated area in the Pend unit. Intake ETs will carc and ensure delivery of these cases to the Pend unit

c. If a case file already exists, the ET will send a file request to the Clerical unit. If the file is immediately available, it will be pulled and placed in the Intake staging area for easy access and matched with the registered application.

Note: Refer to Admin MS 103-7 for transferring files between offices.

d. ET’s will open EIS participation for all adult household members for all TA cases. *This only applies to offices with assigned Work Services contractor. Refer to Addendum D – Work Service/Case Management Process.*

3. CONDUCTING COLD CALL INTERVIEWS

a. ETs will attempt to conduct telephone interviews with clients by doing cold calls. Enter all applications and recertification that need an interview in the scheduling system.

b. If the client is willing to be interviewed, the ET will move the client’s information and requested programs to their individual calendar and complete the interview (follow procedures in section 4 below).

c. If the client declines the interview and would like to schedule an interview at a later date or time, the ET will move the client’s information and requested programs to the unit’s scheduled appointment calendar.

d. Write a CANO stating that the applicant was called for an interview but preferred to have it at a later date or time. Note the agreed upon date and time of the interview.

CANO Example:
Called client for an interview but is not available. Client agreed to schedule interview on 5/15 at 1:00 pm.

e. Open EIS participation for all adult household members for all TA cases. *This only applies to offices with assigned Work Services contractors. Refer to Addendum D – Work Services/Case Management Process.*

f. When the interview is completed, the ET will move the client’s name from the unit calendar to their own individual calendar at the time they conducted the interview.

Note: ET’s using Appointment-plus will change the color to indicate that the interview has been completed. Refer to Addendum A for standardized color code using Appointment-plus.

4. CONDUCTING SAME-DAY INTERVIEWS

a. If the client is available for an interview (face-to-face or by phone), the ET will conduct the interview that day.

b. The ET will get the application from the staging area immediately after calling the client from the lobby for an interview. If the file is not available at the staging area, proceed with interview.

c. For telephone interviews, retrieve application and file from staging area before making the call.

d. Although the goal is to serve clients on a first-come, first-served basis, ETs will first pull applications with programs they are trained to work.

For example, if an ET is trained on all programs, it will be more beneficial for this ET to assist a client with an APA/FS/ME (or other combination) application rather than a client with FS-only application.

e. If a client has been waiting for longer than 30 minutes, the first available ET will assist the client that has been waiting the longest and complete the interview.

f. Based on the level of experience and skill development, an ET may be expected to complete interviews for programs in which they are not fully trained. When processing such cases, the ET must follow the steps below:

- Utilize the help sheets developed to ensure adequate information is gathered during the interview process;
- Complete all data entry and address in detail all requirements for programs in which they are fully trained;
- ETs must not authorize benefits for programs in which they are not fully trained and may only process the case as far as they can without sending notices or authorizing any benefits;
- Place an orange sheet on top, if the application meets expedite processing requirements.
- Submit the case for complete review and authorization and place the application in the “priority processing” basket monitored by the Daily Process Manager (DPM).

Note: ETs are not responsible for incorrect data entry on programs in which they are not fully trained. It is the responsibility of all leadership staff or designees on site to complete the necessary casework on a daily basis. If unable to complete the work, they will consult with the DPM.

5. PROCESSING THE APPLICATION

a. ETs will process the application to completion. Approve, deny or pend the application, as necessary.

b. Carc the application to the appropriate functional team.

6. ORGANIZING CASE FILES AND DOCUMENTS

a. Approvals

- If the ET has the file, all documents must be fastened in the file. *Refer to Administrative Procedures MS 103-1 for information on case file organization.*
- If the ET does not have the file, secure all documents together.

Note: Some offices may use a manila folder to group documents together.

- Print and attach a current CLPM and CAP2.
- Place the file or documents in the designated file control basket.
- Carc to the appropriate functional unit.

b. Pend

- ETs will use the appropriate telephone number as the contact number in all pend notices.
- If the ET has the file, all documents must be fastened in the file. *Refer to Administrative Procedures MS 103-1 for information on case file organization.*
- If the ET does not have the file, secure all documents together.
- Print the pend notice.

- Set an alert on ETAL.
- Hard-pend the case. ETs must update any client information they have on EIS. The case must show “PEND” status on the CAP 2.
- Print and attach a current CLPM and CAP2.
- Carc to the appropriate functional unit.
- Place the case file or documents in the designated File Control basket.
- Place a copy of the pend notice in the designated Pend basket.
- If a CSSD 1603 form is completed at the interview, but the TA and ME cases are not being processed, the original CSSD 1603 will be attached to the pend notice. CSSD 1603 forms will not be submitted to CSSD prior to the TA and ME benefit authorization.
- If there is a pended IA case, the ET will document on CANO the date an Interim Assistance Reimbursement (IAR) form is signed and received from the client.
- Additionally, if IA benefits are pended for receipt of completed AD-2, the ET must attach copies of the GEN 150 (Authorization for Release of Protected Health Information) form to the pend notice. The originals will be secured in the case file.

c. Denials

- If the ET has the file, all documents must be fastened in the file. *Refer to Administrative Procedures MS 103-1 for information on case file organization.*
- If the ET does not have the file, secure all documents together.
- Carc to the appropriate functional unit.
- Place the file or documents in the designated basket or area.

7. MANAGING SCHEDULED APPOINTMENTS

a. ETs will take all scheduled interviews for the day starting at 8:00 A.M. and follow all steps listed above in conducting interviews and processing applications.

Note: Interviews before 8 A.M. and during non-business hours will be offered to working clients only when necessary.

b. If the client does not show up for their interview, the ET will:

- Deny the application for all the programs the client applied for (except Food Stamps).
- CANO the required information.
- Send an F000 notice.
- Place a copy of the F000 notice in the x-rack that is labeled as "no-show, 30-day denials" in the designated staging area.
- Transfer or return the file with the application to the central filing unit.

c. In the event the applicant comes in or calls for their interview later in the day, an ET will interview the client and process the case.

d. Intake ETs will not pull another client for an interview until they have:

- Made a determination (approved, pended, or denied the case)
- Sent the notice
- Assigned the case to the appropriate CARC
- Placed the file and necessary paperwork in the appropriate basket

Note: 100% of pend notices will be placed in the basket located in the supervisor or leadworker's office labeled as "pending." This must be done before the case is forwarded to the Pend unit.

8. MANAGING MAIL-IN/DROP-OFF AND OVERFLOW/ROLLOVER APPLICATIONS

All mail-in/drop off and overflow/rollover applications will be distributed equitably. Distributing the applications will be the responsibility of the Daily Process Manager. All functional area time frames will be considered in the distribution including expedite Food Stamp applications.

Note: Individual offices will designate time to distribute applications to staff.

a. Same-Day Application Processing

Assigned applications are expected to be completed the same day it is received. Supervisors will receive a report if it appears that staff are unable to complete their assigned applications. In this instance, the supervisor will designate available resources within the functional unit to assist in completing the assignment. If an assignment is not completed by a specific time designated by the office, the supervisor will report the work not completed and the mitigating circumstances to the Daily Process Manager (DPM) and the site manager.

b. Processing Overflows or Roll-Over applications

Applications that are not processed the same day it is received will be considered overflows or roll-over applications for the following day. Each morning, Intake ETs will pull all overflows or roll-over applications and deliver them to the DPM for distribution. Most of these applications should have been registered by the clerical unit and carc'd to the appropriate caseload. The applications must also be logged into Appointment-plus or whatever scheduling system is in use by the office.

- ETs will do the cold call and attempt to complete the interview. ETs are expected to make a minimum of at least 3 attempts to contact the client throughout the day and document this action separately in CANO.
- If the ET is able to contact the client for an interview, the ET will conduct the interview, process the case to completion, and send it to the appropriate functional unit.
- If the client declines the interview and would like to schedule a face-to-face or phone interview at a later date or time, the ET will enter the client's information and the program(s) requested on the intake unit mail in the scheduled appointment calendar and write a CANO stating that the applicant was called for an interview but preferred to have it at a later date or time, and note the agreed upon date and time of the scheduled interview.

  CANO Example:
  Called client for an interview but is not available. Client agreed to schedule an interview on 5/15 at 1:00 pm.

- The ET that completes the interview will move the client's name from the unit calendar to their own individual calendar at the time they conducted the interview.

- All registered applications with scheduled appointments will be filed by appointment date in the designated area.

- ETs will ensure that FS expedite applications are processed right away.

- ETs will consistently make cold call attempts to contact clients for interviews when there are no applicants in the lobby or when there are no applicants waiting for scheduled telephonic interviews.

- If the applicant wants to schedule an appointment, enter the appointment in the scheduling system. *Refer to section III (B) (1) – "Managing the interview Schedule" for additional information.*

- Based on the number of clients waiting for an interview (both face-to-face or by phone), the DPM will determine the need to complete a "push" or call "bus" whenever needed. This is to ensure all interviews are completed the same day the client applies. All available staff is expected to participate when asked. In most circumstances this will be the priority and focus of everyone's work.

9. MANAGING ALERTS AND UNIT E-MAIL INBOXES

a. The supervisor, lead worker, or designee will prioritize all alerts and incoming e-mail daily and distribute work to ETs.

b. ETs will work alerts and e-mails on the same day. Each case action must include a CANO and EIS entry.

c. If the ET is unable to complete the case action, the ET will:

- Pend the case.
- Create a CANO entry.
- Send a pend notice.
- Carc the case to the Pend unit.
- Forward a copy of the pend notice(s) to the Pend unit.

d. ETs will clear the alerts and e-mail as soon as they are processed or completed.

   Note: Once an action has been completed, the ET will move the e-mail message to the functional unit's 1-year Archive folder.

e. Any work services-related penalty requests from partner agencies are required to be acted on no longer than one day from the date of the request. *Refer to Addendum D for additional information on Work Services Referral.*

f. If an alert or e-mail generates a pend action, the ET will attempt to get the required information (one verification contact for each piece of verification needed). If unable to get the information, the ET will pend the case, do a CANO entry, send a pend notice, carc case to the Pend unit, and forward a copy of the pend notice(s) to the Pend unit.

10. MANAGING 30-DAY DENIALS

a. The Intake unit is responsible for pulling and denying applications that fall within the 30 day timeframe.

b. The supervisor, leadworker or designee will pull applications that need action. ETs will check the report daily to ensure denials are done timely.

c. All denials will be shared among the members of the unit daily. This task shall be monitored by the lead worker to ensure it is completed.

C. MAINTENANCE INTERVIEW

Eligibility Technicians assigned to the Maintenance Interview unit are responsible for ensuring all recertification/reviews that require an interview are processed and eligibility determinations are made in an expeditious manner.

1. PROCESSING RECERTIFICATION AND REVIEWS

a. All recertification/ reviews will be registered by the Clerical unit whenever possible. In instances when the Clerical unit is unable to register, the ET will register the review/application in EIS. When this situation occurs, the ET is not permitted to authorize benefits for the case once it is ready to process. ETs are also allowed to add a program to an existing registration—if they did not register the existing registered program—In APMA.

- If the case is ready-to-work, the ET will complete the CANO and all EIS screens, except for authorization screens.
- All documentation deemed ready-to-work will be carc'd and hand delivered to the Pend unit for authorization. The Pend unit will have a clearly identified basket for these cases.

Note: Initial screening and determination of a required interview will be completed by an OA when registering the case. The OA will check the ADDR to determine if an interview is due. If ADDR shows interview is due, or if it is not indicated on the ADDR, the OA will carc and route it to Maintenance Interview unit.

b. If applicable, the OA will determine if a case is assigned to another site or area. If it is, the OA will register the case and forward it to the other site/area immediately.

c. If the Clerical unit is unable to complete all the daily work, ET resources will be pulled for screening purposes to ensure expedite Food Stamp requirements are met. Expedite FS reapplications will be identified and given to an ET from the Maintenance Interview unit assigned to handle FS expedite cases.

Note: Send expedite FS recertification/reviews for another site/region the same day it is received. To ensure expedite timeframes can be met, the ET or OA will make immediate contact with the receiving site before sending the case or transferring the expedite review/recertification out.

d. When an interview is not required:

- Send the application or recertification/review immediately to the Maintenance Reports of Change unit for processing.

- If a new program has been requested on the Gen 72, the ET will:
  - CANO the request.
  - Send an N000 to instruct client to print a Gen 50B (Application for Services) online or mail one, and schedule an appointment for an interview.
  - Copy the first page of the Gen 72 and send it to the Intake unit along with a copy of the N000 notice.

e. If an interview is required and the client is in the office the ET will follow the steps below.

- Request the file from the Clerical unit if the file is not available in the Maintenance Interview unit staging area.

- Pull all necessary interfaces.

- Complete the interview.

- Make at least one attempt to gather any information needed to process the case and determine eligibility.

- If the case is denied or closed and there are other benefits that are set to close at the end of the month, carc the case to the closed CARC, appropriate for each site.

- Complete all case actions based on the client's request, report of change, etc.:
  - Approve, pend or deny
  - Send the notice.

  - Assign the case to the appropriate CARC.
  - Place the file and necessary paperwork in the appropriate basket.
  - Send an e-mail to the Control Clerk to request the file.
  - If the recertification or review is pended, carc it to the Pend unit.
  - Print the pend notice.

  Note: 100% of pend notices will be placed in the supervisor/leadworker's office in the basket labeled "pending" before they are forwarded to the Pend unit.

- Return the file and other documents to the Central Filing unit.

f. If an interview is required but the client is not in the office, the ET will follow the steps below.

- Call the client to conduct a telephone interview.

- If the client is contacted by phone, complete the interview immediately and request the file.

- If the client is unable to complete the interview at the time of the call, schedule an appointment on the unit schedule appointment calendar, CANO the action, send an appropriate notice, and place the file and paperwork in the appropriate basket.

- ETs will make cold calls daily for recertification/reviews requiring an interview. If the client does not answer, the ET will leave a message informing the client that an interview is needed to complete their recertification/review and will make another call in five minutes. ETs will make a minimum of three attempts to reach the client throughout the day.

- If unsuccessful, schedule an appointment on the Maintenance Interview schedule, document all attempts to contact, and send the appropriate notice. Ensure case is carc'd to the appropriate unit.

  The CANO must state that the applicant was called for an interview but preferred to have it at a later date or time, note the agreed upon date and time of the interview.

CANO Example:
Called client for an interview but is not available. Client agreed to schedule interview on 5/15 at 1:00 pm.

- File the notice of action by due date and then in alphabetical order in the “Scheduled Appointment” pend rack.

g. If the client contacts the office for an interview, the ET will follow the steps below.

- Attempt to complete the interview at the time the client first calls. If unable to conduct the interview, schedule a telephone appointment.
- Request the file from the central filing unit through e-mail or Appointment-plus.
- Pull all interfaces.
- Complete the interview.
- Make at least one attempt to gather any information needed to process the case.
- Process the case (approve, pend, or deny). If case is pended, send a copy of the pend notice to the Pend unit.
- Return the file and other documents to the Central Filing unit.

2. MANAGING ALERTS AND UNIT E-MAIL INBOXES

a. The supervisor, lead worker, or designee will prioritize all alerts and incoming e-mail daily and distribute work to all ETs.

b. ETs will work alerts and e-mails on the same day. Each case action must include a CANO and EIS entry.

c. If the ET is unable to complete the case action, the ET will:

- Pend the case.
- Complete a CANO entry.

- Send a pend notice.
- Carc the case to the Pend unit.
- Forward a copy of the pend notice(s) to the Pend unit.

d. ETs will clear the alerts and e-mail as soon as they are processed or completed.

Note: Once action has been completed, the ET will move the e-mail message to the functional unit's 1-year Archive folder.

e. Any work services-related penalty requests from partner agencies are required to be acted on no longer than one day from the date of the request. *Refer to Addendum D for additional information on Work Services Referral.*

f. If an alert or e-mail generates a pend action, the ET will attempt to get the required information (one verification contact for each piece of verification needed). If unable to get the information; the ET will pend the case, complete a CANO entry, send a pend notice, carc the case to the Pend unit and forward a copy of the pend notice(s) to the Pend unit.

3. MANAGING 30-DAY DENIALS

a. The Maintenance Interview unit is responsible for pulling and denying recertification/reviews that fall within the 30 day timeframe.

b. Supervisors and leadworkers will pull a copy of the unacted report to keep track of recertification/reviews that need action and distribute the report to ETs. ETs will check the report daily to ensure denials are done timely.

c. All denials will be shared amongst the unit daily.

4. PROCESSING RECERTIFICATIONS AND REVIEWS

a. The supervisor or leadworker will identify the total number of recertification/reviews due in the following month. The supervisor will work with the team to determine the number of reviews requiring an interview and ones that do not. The team will work together to develop a goal for the month (such as: number of recertification/reviews required to be completed each day, the number of interviews held each day, the number of reports of change processed, etc.). The goal must be to focus on timely and accurate completion of the unit's workload while anticipating the need to assist other functional units.

b. ETs will process reviews and recertification that do not require an interview.

c. ETs will register the Gen 72 for all programs requested by a client (requests for services – RF, RA, etc.). ETs will work the case to completion except authorization of benefits, carc the case to the Pend unit and hand deliver to the designated area in the unit for this type of case.

   Note: All recertification/reviews will be registered by the Clerical unit whenever possible. In instances when the Clerical unit is unable to register, the ET will register a review/application on EIS. When this situation occurs, the ET is not permitted to authorize benefits for the case once it is ready to process. ETs are also allowed to add a program to an existing registration (if they did not register the existing registered program) in APMA.

d. If a new program has been requested on the Gen 72, the ET will call the client to see if they want to apply for the new program.

   - If the client wants to apply for the new program, the ET will:
     - Add the program on APMA.
     - Complete the interview.
     - Process the case at that time and pend for all items needed including the Gen 50b application.

   - If the client does not want to apply for the new program, the ET will:
     - CANO the contact.
     - Process the recertification/review for other programs.

e. If the ET is unable to reach a client, the ET will:
   - CANO the attempt.
   - Send an N000 to instructing the client to print a Gen 50B (Application for Services) online or mail them one and schedule an interview appointment.
   - Copy the first page of the Gen 72 and send it to Intake unit along with a copy of the N000 notice.

f. The ET will process the case for the programs needing a recertification/review.

- If the case is denied or closed and there are other benefits that are set to close at the end of the month, the ET will carc the case to the appropriate closed CARC, for each site.
- The ET will request the case file from the Clerical unit.

g. If the required information or verification is not available with the recertification/review, the ET will make at least one attempt to contact client.

h. If an ET is unable to complete a case action, the ET will:
   - Pend the case.
   - Complete a CANO entry.
   - Send a pend notice.
   - Carc the case to the Pend unit.
   - Forward a copy of the pend notice(s) to the Pend unit.

Note: 100% of pend notices will be placed in the supervisor/leads office in the basket labeled "pending" before they are forwarded to the Pend Unit. The goal is to review 100% of the pend notices.

5. MAKING COURTESY CALLS

a. If possible, ETs will make courtesy calls to all clients due to recertify one month prior to their recertification/review due date. The ET will remind clients of the requirement and that they will be called for an interview once their paperwork is received.

Note: If clerical staffing resources allow, OAs may also be asked to perform this task.

b. Ensure calls are placed during the last two days of the month and inform clients to turn in recertification/reviews no earlier than the first of the month.

Note: Recertification/review received earlier than the first of the month are registered the day it was received or by the next business day.

D. PEND

Eligibility Technicians assigned to the Pend unit are responsible for ensuring all applications and cases in pend status are reviewed and processed timely.

1. PROCESSING VERIFICATION

a. ETs will process verification as received. Ideally, all verification will be processed the date the document is received in the office. If the unit is unable to meet this goal, the lead worker or supervisor will notify the leadership team for potential resource and support.

- Mail will be reviewed and documented daily (either the same or the next day).

  Note: It is critical that all pieces of mail or verification are documented within 24 hours after receipt and forwarded to file control immediately to reduce the amount of lost paperwork.

- ETs will aggressively pursue any required verification not provided by the client.

- Process cases with complete verification once all the required information is received.

b. If the case file is needed, the ET will request the file from the central filing unit.

  Note: When denying an application or recertification/review for failure to provide, ETs are required to request and review the case file.

c. If a case file is not necessary, ETs will process the verification.

d. If the case is denied or closed and there are other benefits that are set to close at the end of the month, the ET will carc the case to the closed CARC appropriate for each site.

e. Once the case is processed, change the CARC to the appropriate caseload:

- Carc to an “Open” caseload if the case was recently assigned to the office; or
- Carc it to a “Closed” caseload.

f. If the case file was obtained, forward the case file to the Central Filing unit. Send the benefit authorization screens with the file.

g. The ET will pull and discard the pend notice from the Pend unit staging area once the case is completed.

2. HANDLING LONG-TERM PEND (INCLUDING IA)

a. If an application is pended for an extended period (including Interim Assistance applications), and there are open programs attached to the case, the ET will carc the case to the correct caseload. The ET will transfer the case to the Pend unit once the verification is received on the pended IA/AP case.

b. If an application is pended for an extended period (including Interim Assistance applications) and there are no open programs attached to the case, the processing ET will carc the case to the Pend unit for monitoring and processing.

3. HANDLING MAIL-IN AND DROP-OFF VERIFICATION

a. Verification that is dropped-off or mailed-in will be routed to the Clerical unit immediately. OAs will print the CLPM and CAP2, attach the printout to the document and forward to the correct functional unit.

b. The ET will process the verification as indicated in section 1.

4. HANDLING PHONE CALLS

a. The public (including clients, employers, landlords, etc.) are provided a direct line to contact the Pend unit. There is also an option on the main switchboard to route calls from clients directly to the Pend unit.

b. When handling phone calls, document the verification and additional information provided by the client. ETs will complete a CANO entry, update EIS, and determine eligibility. If additional information is still needed, this will be noted in the case note title.

c. The unit's direct phone line should be covered at all times. Only under extreme circumstances will call go to voice mail. These calls must be returned as quickly as possible.

5. MANAGING ALERTS AND UNIT E-MAIL INBOXES

a. The supervisor, lead worker, or designee will prioritize all alerts and incoming e-mail daily and distribute work to all ETs.

b. ETs will work alerts and e-mails on the same day. Each case action must include a CANO and EIS entry.

c. If the ET is unable to complete the case action, the ET will:

- Pend the case.
- Complete a CANO entry.
- Send a pend notice.
- Carc the case to the Pend unit.
- Forward a copy of the pend notice(s) to the Pend unit.

d. ETs will clear the alerts and e-mail as soon as they are processed or completed.

Note: Once action has been completed, the ET will move the e-mail message to the functional unit's 1-year Archive folder.

e. Any work services-related penalty requests from partner agencies are required to be acted on no longer than one day from the date of the request. *Refer to Addendum D for additional information on Work Services Referrals.*

f. If an alert or e-mail generates a pend action, the ET will attempt to get the required information (one verification contact for each piece of verification needed). If unable to get the information, the ET will pend the case, do a CANO entry, send a pend notice, carc case to the Pend unit and forward a copy of the pend notice(s) to the Pend unit.

6. HANDLING DENIED CASES FOR FAILURE TO PROVIDE – INFORMATION PROVIDED WITHIN 30/60 DAYS

If an application or recertification has been denied for failure to provide and the client provided the information within the 30/60-day timeframe, the Pend unit is responsible for processing the case.

The ET will:

a. Complete a CANO entry.
b. Send the appropriate notice.
c. Make an eligibility determination.
d. Change the CARC based on the action or determination.
e. Transfer the case file to the central filing unit for filing.

7. PROCESSING READY-TO-WORK CASES FROM OTHER TEAMS

The Pend unit is responsible for processing ready-to-work cases from other teams. These cases include applications or recertification/reviews that have been registered by ETs and processed only to a certain point. If an ET registered the application and conducted the interview or recertification, they are not allowed to process any benefits on the same case.

a. If case is ready-to-work, the ET will submit the case to the Pend unit for processing and authorization.

b. The initial ET who registered the application or recertification/review and conducted the interview is expected to complete a full CANO and update all EIS screens.

c. The ET in the Pend unit should only have to enter their PCN to authorize benefits.

d. When the ET in the Pend unit receives a ready-to-work case, they will enter their PCN on the payment screen to authorize the benefit and send the appropriate notices.

E. REPORT OF CHANGE

Eligibility Technicians assigned to the Report of Change unit are responsible in ensuring ongoing eligibility is determined for recipients when an interview is not required or needed. This unit will also handle reports of change, alerts, penalties, and other duties as assigned.

1. HANDLING REPORTS OF CHANGE (DROP-OFF AND MAIL-IN)

a. All paper reports of change that are dropped-off or mailed-in will be routed to the Clerical unit. The OAs will screen these reports and forward immediately to the appropriate site, region, or to the Report of Change unit.

b. ETs will work reports of change on the date received. If for some reason the unit is unable to meet this requirement, the supervisor, leadworker or designee will sort all unprocessed reports of change by date order.

c. ETs will pull the reports for completion every day and take action on all reports of change on the date received. This is critical to ensure that minimal backlog is created.

d. If the case file is needed, the ET will request the file from the Clerical unit.

e. ETs will aggressively pursue any required verification to complete all reports of change prior to pending the case.

f. ETs will match all the report of changes together (if other changes have been received on the case).

g. If the case is denied or closed and there are other benefits set to close at the end of the month, the ET will carc the case to the closed CARC appropriate for each site.

h. If the ET is unable to complete a change, the ET will pend the case, do a CANO entry, send a pend notice, carc to Pend and forward a copy of the notice to the Pend unit. If a case is approved, the ET will change the CARC to the Open caseload.

i. If a report of change is processed without the case file, the ET will print a current CLPM and CAP2. Benefit authorization screens must also be printed and filed in the case file.

j. If the case file was obtained, forward the case to the Central Filing unit with all paperwork secured in the file.

2. HANDLING REPORTS OF CHANGE (BY PHONE)

a. As soon as the report is received, the ET will process the change, complete a CANO entry, and update EIS as appropriate.

b. If a case file is needed, the ET will request file from the control clerk team by e-mail.

c. The ET will aggressively pursue any required verification to complete all reports of change prior to pending the case.

d. If the ET is unable to complete a change, the ET will:

- Pend the case.
- Complete a CANO entry.
- Send a pend notice.
- Carc the case to the Pend unit.
- Forward a copy of the pend notice(s) to the Pend unit.

e. If a case is approved, the ET will carc the case to the Open caseload.

f. If the case is denied or closed and there are other benefits that are set to close at the end of the month, the ET will carc the case to the appropriate closed CARC for each site.

g. If a report of change is processed without the case file, the ET will forward the document to the Central Filing unit to be filed in the case file. If the case file was obtained, forward the case to the Central Filing unit.

3. MANAGING ALERTS AND UNIT E-MAIL INBOXES

a. The supervisor, lead worker, or designee will prioritize all alerts and incoming e-mail daily and distribute work to all ETs.

b. ETs will work alerts and e-mails on the same day. Each case action must include a CANO and EIS entry.

c. If the ET is unable to complete the case action, the ET will:

- Pend the case.
- Complete a CANO entry.
- Send a pend notice.
- Carc the case to the Pend unit.
- Forward a copy of the pend notice(s) to the Pend unit.

d. ETs will clear the alerts and e-mail as soon as they are processed or completed.

Note: Once action has been completed, the ET will move the e-mail message to the functional unit's 1-year Archive folder.

e. Any work services-related penalty requests from partner agencies are required to be acted on no longer than one day from the date of the request. *Refer to Addendum D for additional information on Work Services Referral.*

f. If an alert or e-mail generates a pend action, the ET will attempt to get the required information (one verification contact for each piece of verification needed). If unable to get the information, the ET will pend the case, do a CANO entry, send a pend notice, carc case to the Pend unit and forward a copy of the pend notice(s) to the Pend unit.

4. PROCESSING RECERTIFICATIONS AND REVIEWS

a. The supervisor or leadworker will identify the total number of recertification/reviews due in the following month. The supervisor will work with the team to determine the number of reviews requiring an interview and ones that do not. The team will work together to develop a goal for the month (such as: number of recertification/reviews required to be completed each day, the number of interviews held each day, the number of reports of change processed, etc.). The goal must be to focus on timely and accurate completion of the unit's workload while anticipating the need to assist other functional units.

b. ETs will process reviews and recertification that do not require an interview.

c. ETs will register the Gen 72 for all programs requested by a client (requests for services – RF, RA, etc.). ETs will work the case to completion except authorization of benefits, carc the case to the Pend unit and hand deliver to the designated area in the unit for this type of case.

Note: All reviews/recertification will be registered by the Clerical unit whenever possible. In instances when the Clerical unit is unable to register, the ET will register a review/application on EIS. When this situation occurs, the ET is not permitted to authorize benefits for the case once it is ready to process. ETs are also allowed to add a program to an existing registration (if they did not register the existing registered program) in APMA.

d. If a new program has been requested on the Gen 72, the ET will call the client to see if they want to apply for the new program.

- If the client wants to apply for the new program, the ET will:
  - Add the program on APMA.
  - Complete the interview.
  - Process the case at that time and pend for all items needed including the Gen 50b application.

- If the client does not want to apply for the new program, the ET will:
  - CANO the contact.
  - Process the recertification/review for other programs.

e. If the ET is unable to reach a client, the ET will:
- CANO the attempt.
- Send an N000 to instructing the client to print a Gen 50B (Application for Services) online or mail them one and schedule an interview appointment.
- Copy the first page of the Gen 72 and send it to Intake unit along with a copy of the N000 notice.

f. The ET will process the case for the programs needing a recertification/review.

- If the case is denied or closed and there are other benefits that are set to close at the end of the month, the ET will carc the case to the appropriate closed CARC, for each site.
- The ET will request the case file from the Clerical unit.

g. If the required information or verification is not available with the recertification/review, the ET will make at least one attempt to contact client.

h. If an ET is unable to complete a case action, the ET will:
   - Pend the case.
   - Complete a CANO entry.
   - Send a pend notice.
   - Carc the case to the Pend unit.
   - Forward a copy of the pend notice(s) to the Pend unit.

Note: 100% of pend notices will be placed in the supervisor/leads office in the basket labeled "pending" before they are forwarded to the Pend Unit. The goal is to review 100% of the pend notices.

5. MAKING COURTESY CALLS

a. If possible, ETs will make courtesy calls to all clients due to recertify one month prior to their recertification/review due date. ET's will remind clients of the requirement and inform them that they will be called for an interview once their paperwork is received.

Note: If clerical staffing resources allow, OAs may also be asked to perform this task.

b. ET's will ensure that calls are made during the last two days of the month and remind clients to turn in recertification/reviews no earlier than the first of the month.

Note: Recertification/review received earlier than the first of the month are registered the day it was received or by the next business day.

ADDENDUM A

APPOINTMENT-PLUS COLOR CODING

A committee which includes representatives from various offices statewide, decided on the color coding to use for scheduling appointments in Appointment-plus.

Note: Not all offices use Appointment-plus. This color coding is only for offices using Appointment-plus.

Color	Appointment Type
Light Pink	3:00 PM Interview
Light Blue	9:30 AM Interview
Fuchsia	Waiting over 30 minutes
Orange	Waiting in the lobby
Yellow	Telephonic
Green	Confirmed interview
Blue	Completed interview

ADDENDUM B

DISTANCE DELIVERY

Distance delivery includes providing services in the following situations.

- Clients come in to a district office that is not their usual or regularly-assigned office
- A DPA office receives an application, recertification/review, or documents from clients whose case is assigned to another office
- Clients living in rural areas that are served by fee agents

1. **When clients come in to a district office that is not their usual or regular assigned office, staff must provide the following services.**
   a. Answer basic client questions.
   b. If a client is submitting verification, staff must:
      - Review the document(s) for completeness.
      - Print a current CLPM and CAP2 and attach it to the document(s).
      - Forward the document(s) to the assigned office.
   c. If a client is reporting a change of address:
      - Update the ADDR immediately.
      - Set an alert on ETAL.
      - Print a current CLPM and CAP2 and attach it to the document(s).
      - Forward the document(s) to the assigned office either by fax, scan/e-mail, or mail. (Some offices in rural areas may not accommodate scan/e-mail transfers due to bandwidth issues.)

        Note: If the client has relocated from another region, request the case file. Refer to Administrative Procedures Manual section 103-7 for additional information on case file transfers.

2. **When a DPA office receives an application, recertification/review, or documents from a client whose case is assigned to another office all regions will follow specific procedures.**

   For example, when a client's case is carc'd to another office and the client does not have a phone number where they can be contacted for an interview (i.e., the client is in Gambell and the case is assigned to Mat-Su), established procedures must be followed.

   Note: Despite the difference in the procedure for handling these cases, staff must ensure there is adequate and proper documentation so that offices are aware of actions already taken and what is still needed for processing the case.

   a. **CENTRAL REGION PROCEDURE**

      Coordination between sites in the region will take place when a client does not have a phone number where they can be contacted for their interview.

      - Enter the client on the Appointment-plus calendar where an assigned ET will be conducting the interview *(i.e., Mat-Su – standardized color coding system will be decided later)* to indicate the client is waiting in the lobby.
      - Select "phone interview" and note in the address of the field office where client is, scan or fax the recertification/review to the functional team's e-mail and note in Appointment-plus that the application or recertification/review was scanned/faxed.
      - Advise the client that they will be contacted for their interview as soon as an ET is available to interview them across sites, or in a designated area.

   b. **KENAI OFFICE PROCEDURE**

      - If the Kenai Office receives an application, recertification/review, or other documents for another office, staff will fax or scan/e-mail the information to the appropriate office the same day it is received.

c. NORTHERN REGION PROCEDURE

- When the Fairbanks office receives an application for another office, all of the information provided for the address and phone numbers is verified. It is then updated it in the ADDR screen at registration if necessary. After registration, the SVES is run and other screens are checked for accuracy.
- The application is then scanned along with the document(s) to the appropriate clerical functional e-mail.
- The original documents are maintained in the office for 30 days and an electronically scanned version is kept for 1 year.

3. Clients living in rural areas and areas served by fee agents

Access for rural areas is an important part of delivering Public Assistance services. Fee agents assist in providing distance delivery service to ensure clients in rural areas are given services similar to clients living in areas with a Public Assistance office.

a. Registering Gen 50B – Application for Services:

- OAs will register applications received from rural areas or fee agents as soon as the application is received in the office.
- If there is a fee agent interview attached, the application will go on the next day's interview schedule in the scheduling system. The supervisor or DPA will assign the application to an ET the following morning.

  Note: Some offices use Appointment-plus for their scheduling system. Other offices, due to bandwidth issues use other programs to schedule appointments such as Outlook, Excel, etc. Also, for some offices, if the application is received before 4:00 pm, it is distributed the same-day it is received.

- If there is no fee agent interview, the OA will call the client to book the soonest available telephonic appointment.

- If the client cannot be reached to schedule the interview, the OA will:
  - Determine the deadline date for the client to call DPA for an interview date using the adverse action calendar and the 3:00 pm interview slot.
  - Send the client an N000 notice to notify the client of their appointment date and time.
  - Place the file in the clerical filing cabinet located inside the clerical work area. This application will be designated on the scheduling system as a telephonic interview.

  Note: The location where the file is kept may vary in each office. Also, offices may choose to continue making additional attempts to reach the client prior to the scheduled appointment.

b. Conducting the Interview:

- On the day of the scheduled appointment, the ET will pull the applications at the beginning of the day and will begin to attempt conducting telephonic interviews.

- When time allows, ET's will attempt to contact individuals in advance of the day of the appointment

c. Report of Change

- Reports of change and other client documents are received in the clerical unit.

- OAs will forward the document(s) to the appropriate unit to which it is assigned**.**

- If a case closed within the last 30 days, the OA will forward it to the team that last worked it.

ADDENDUM C

OPENING CMS ACTIVITY AT TIME OF TA APPLICATION

Eligibility staff will use the following procedure to open CMS for the Work Services case manager.

ETs are required to open the JOMO screen for each adult included in the Temporary Assistance case (for a one-parent or two-parent household) by the time the applicant leaves the ET's office or at the time the ET is making or attempting to make the first cold call. If an interview is scheduled, the ET will open the JOMO screen within one day of the date the customer applied.

1. ALL CASES

- Code the SEPA screen with the appropriate participation code (IN, DF, DI, DJ, or PA).

- Use NEXT command to open the WORK Screen and put an X next to the participating adult in the household.

- Continue coding the WORK screen. If there is an exemption reason, code the correct exemption reason code in the WA exempt reason column.

  Note: Even if a customer is exempt from work activities, they are not exempt from case management and completing a Family Self Sufficiency Plan. The customer needs to be referred to case management.

- On cases with a work exemption, change the Voluntary code from "N" to "Y", this will open the JOMO screen which then reads into the CMS system for case manager availability.

- The EIS system will move forward to the FIAC screen in the application sequence.

- Go to the bottom of the FIAC screen and NEXT back to the WORK screen.

- There are two ways to check to see if the JOMO screen opened:
  - Put a “J” next to the adult in the household and hit enter. This will take the ET to the JOMO screen.
  - Go to the bottom of the WORK screen and put the client number that corresponds to the adult in the household. Next to JOMO. This will take the ET to the JOMO screen if the case has been opened for case management.

- When the JOMO screen opens ensure the information corresponds to the month and program needed.
  - The program should show as **JB.**
  - The month should show as the **application month.**
  - The status should show as **OP.**

- NEXT to CARC and enter the correct contractor CARC.

  Note: If there are issues in getting the JOMO screen opened, the ET must contact the supervisor for help.

Two-Parent households:

- ETs may need to go to the WORK screen a few times to get JOMO screens opened for both parents.
- Put an X next to both adults (sometimes it will only open one of the parents during this process).
- Follow the information as for ALL CASES.
- Repeat this process for each parent in the household.

2. MINOR PARENT CASES:

- To open and code JOMO for minor parent cases, follow the same procedure used for ALL CASES.

- Minor Parents <u>**will always**</u> need the Voluntary coding on the WORK screen turned to “Y”, as EIS will automatically exemption them as a child. Even if the WA exemption “CH” is deleted, the system defaults back to this coding and will not accept the change, so the only way to get the referral is to mark the Minor Parent as Voluntary.

3. ANI CASES

- Adults in ANI cases are not referred for Work Services and the JOMO screen would not be opened.

- ANI cases may be a relative applying for TA for the child only and the relative's needs are not included; or when one (AI) or both (2P) Parent(s) are on SSI or APA (IA is not considered APA).

  Note: These adults are not coded "IN" on the case and SEPA coding for their participation would be "OU".

4. INELIGIBLE ALIEN CASE:

- To open and code JOMO for ineligible alien cases, follow the same procedure used for ALL CASES.

- Ineligible Aliens will always need the Voluntary coding on the WORK screen turned to "Y," as EIS does not see them as mandatory for Work Services

5. ANI CASES CONVERTED TO AI CASES

- For ANI cases that are converted to AI, the JOMO must be opened effective the date the adult is added or included in the TA case.

- To open and code JOMO for these adults, follow the same procedure used for ALL CASES.

- If the case will not open using the month the adult is added to the TA, the ET may need to go to the current "calendar" month in EIS and open the JOMO for that month.

- The ET will go to the JOMO and adjust the start date to coincide with the date the customer is being added to the case.

- Ensure the CANO title identifies that an adult is added to the TA case.

  Note: If there are issues in getting the JOMO opened, the ET must contact the supervisor to help move through this item.

6. ADDING 2ND PARENT TO EXISTING 1-PARENT HOUSEHOLD

- The JOMO screen needs to be opened effective the date of the client being added to the TA case participation.

- To open and code JOMO for these adults, follow the same procedure used for ALL CASES.

- If the case will not open using the month the client is added to the TA, the ET may need to go to the current “calendar” month in EIS and open the JOMO in that month.

- The ET will go to the JOMO and adjust the start date to coincide with the date the client is being added to the case.

  Note: If there are issues in getting the JOMO opened, the ET must contact the supervisor to help move through this item.

- Ensure the CANO title identifies that a second parent is added to the TA case.

- Set an alert for the current case manager and follow the same procedure used for ALL CASES.

ADDENDUM D

WORK SERVICES/CASE MANAGEMENT PROCESS

Tasks relating to the Work Services process will vary according to individual region or office location. Each region or office that partners with Work Services contractors will develop their own procedures pertaining to coding the systems, referring individuals for case management, imposing penalties, etc.

1. **ANCHORAGE AREA (Nine Star referral process for applicants that apply after 7/1/2010)**

   The following process was developed to improve efficiency of initial employment assessment referrals for the Anchorage area.

   a. **In person TA Applicant**

   - The Clerical unit distributes the DPA Employment Planning Information (EPI) form to all TA applicants at the time that they request a TA application. When a client comes in to apply for TA, the OA will accept and register the TA application immediately.

   - The assigned ET will complete the following steps to refer applicant(s) to a Work Services case manager.
     - Register the open TA applicant's EIS participation.
     - Code the WORK screen.
     - Check the JOMO screen to ensure it is in OP status for all adults in the household.
     - Carc all JAS/CMS customers to Maximus (918-9-97).
     - Print a CLPM and place it in a designated basket.

   Note: Refer to Addendum B for additional information on opening CMS activity at TA application.

   - The ET will explain to the applicant(s) that if they do not see the Work Services staff for assessment and they are found eligible for Temporary Assistance, the benefit amount may be reduced due to a penalty.

   - The ET will call the designated Nine Star contact to inform them an applicant is waiting to be seen after the interview has been completed.

- Gambell: Primary contact - Louis Bonner (269-6513)
  Secondary contact - Sherry Beals (339-0847)

- Muldoon: Primary contact - Jim Hamilton (339-0841)
  Secondary contact - Elizabeth Winkler (339-0839)

- The ET will ask the applicant(s) to remain in the DPA lobby, tell them that the Work Services staff will be with them shortly, and that the wait should be no longer than five minutes.

- If the applicant had a TA case that closed within the last 12 months (post-TA period) and is currently carc'd to DOL or Nine Star, an OA will set a C-Alert "Client reapplied TA eff (Date)". The ET will not change the assigned CARC at this time and will not refer the case to a new service provider.

- If the client application is approved during the post TA period, the ET will set a C-Alert "TA reopened eff date". The ET will not change the CARC; the post-TA case manager will coordinate assignment of the open case to appropriate Nine Star ESS.

b. Telephonic Interviews for clients that choose not to stay for face-to-face eligibility interviews

- The Clerical unit will distribute a DPA Employment Planning Information (EPI) form to all TA applicants at the time that they request a TA application.

- TA applicants that come to the office but elect to be interviewed telephonically will be referred to Nine Star prior to leaving the office.

- The Navigator will explain to applicants that they are expected to see a Work Services case manager immediately.

- The ET will explain to the applicant(s) that if they do not see the Work Services staff for assessment and they are found eligible for Temporary Assistance, the benefit amount may be reduced due to a penalty.

- The ET will call the designated Nine Star contact to inform them that client will be completing a telephonic DPA interview so they are available immediately for assessment.

  - Gambell: Primary contact - Louis Bonner (269-6513)

- Secondary contact - Sherry Beals (339-0847)

- Muldoon: Primary contact - Jim Hamilton (339-0841)
- Secondary contact - Elizabeth Winkler (339-0839)

- The ET will ask the applicant(s) to remain in the DPA lobby, tell them that the Work Services staff will be with them shortly, and that the wait should be no longer than five minutes.

- An OA will accept and register the TA application immediately.

  Note: The ET may not be able to get the WORK screen coded prior to the case management interview, so a paper FSSP and intake may need to be completed.

- The assigned ET will complete the following steps to refer applicant(s) to a Work Services case manager.

  - Register the open TA applicant's EIS participation.
  - Code the WORK screen.
  - Check the JOMO screen to ensure it is in OP status for all adults in the household.
  - Carc all JAS/CMS customers to Maximus (918-9-97).
  - Print a CLPM and place it in a designated basket.

  Note: Refer to Addendum B for additional information on opening CMS activity at TA application.

- If the applicant had a TA case that closed within the last 12 months (post-TA period) and is currently carc'd to DOL or Nine Star, an OA will set a C-Alert "Client reapplied TA eff (date)". The ET will not change the assigned CARC at this time and will not refer the case to a new service provider.

- If the client application is approved during the post TA period, the ET will set a C-Alert "TA reopened eff (date)". The ET will not change the CARC; the post-TA case manager will coordinate assignment of the open case to the appropriate Nine Star ESS.

c. "Paper People" (Clients that cannot wait to be seen by Nine Star or their application was received as a mail-in or drop-off)

- An OA will register the TA application

- The assigned ET will complete the following steps to refer applicant(s) to a Work Services case manager.
    - Register the open TA applicant's EIS participation.
    - Code the WORK screen.
    - Check the JOMO screen to ensure it is in OP status for all adults in the household.
    - Carc all JAS/CMS customers to Maximus (918-9-97).
    - Print a CLPM and place it in a designated basket.

    Note: This eligibility function will be completed even if an interview cannot be completed.) Before placing the CLPM in the designated basket, the ET will write "Mail/Drop or unable to wait" on the CLPM.

- Nine Star will send a notice giving the client 10 days to come in to see a case manager.

d. Walk-In Clients (applicant or ongoing customer that has already been referred to Nine Star)

- The client will be instructed to check in with the designated Nine Star contact at the Gambell Job Center.
- If an ET initially denies a TA case and reconsiders the case, or if an ANI case converts to an AI case, the ET needs to notify the appropriate Nine Star contact: Louis Bonner (269-6513).
- If an ET closes an on-going TA case and then reopens the case, the ET needs to notify the current Nine Star case manager that the case has been reopened.
- To ensure that clients are not missed, Nine Star will conduct a weekly reconciliation of the Work Services caseload report for full service office 250. If Nine Star notices any trends where CLPMs are not being provided, Nine Star will inform the DPA Site Manager for follow-up.

2. MAT-SU AREA (MAXIMUS referral process for applicants that apply on or after 7/1/2010)

The following process was developed to improve efficiency of initial employment assessment referrals for the Mat-Su area.

a. In-person TA Applicant

- The Clerical unit distributes the DPA Employment Planning Information (EPI) form to all TA applicants at the time that they request a TA application. When a client comes in to apply for TA, the OA will accept and register the TA application immediately.

- The assigned ET will complete the following steps to refer applicant(s) to a Work Services case manager.

  - Register the open TA applicant's EIS participation.
  - Code the WORK screen.
  - Check the JOMO screen to ensure it is in OP status for all adults in the household.
  - Carc all JAS/CMS customers to Maximus (918-9-97).
  - Print a CLPM and place it in a designated basket.

  Note: Refer to Addendum B for additional information on opening CMS activity at TA application.

- The ET will explain to the applicant(s) that if they do not see the Work Services staff for assessment and they are found eligible for Temporary Assistance, the benefit amount may be reduced due to a penalty.

- The ET will call the designated Maximus contact to inform them an applicant is waiting to be seen after the interview has been completed.

  - Primary contact - Catherine Gregory (352-2560)
  - Secondary contact – Debbie Robinson (352-2565)

- The ET will ask the applicant(s) to remain in the DPA lobby and tell them that the Work Services staff will be with them shortly, and the wait should be no longer than five minutes.

- If the applicant had a TA case that closed within the last 12 months (post-TA period) and is currently carc'd to DOL or Maximus, an OA will set a C-Alert "Client reapplied TA eff (Date)". The ET will not change the assigned CARC at this time and will not refer the case to a new service provider.

- If the client's application is approved during the post TA period, the ET will set a C-Alert "TA reopened eff (date)". The ET will not change the CARC; the post-TA case manager will coordinate assignment of the open case to appropriate Maximus staff member.

b. Telephonic Interviews for clients that chose not to stay for face to face eligibility interviews

- The Clerical unit will distribute a DPA Employment Planning Information (EPI) form to all TA applicants at the time that they request a TA application.

- TA applicants that come to the office but elect to be interviewed telephonically will be referred to Maximus prior to leaving the office.

- Navigators will explain to customers that they are expected to see a Work Services case manager immediately.

- The ET will explain to the applicant(s) that if they do not see the Work Services staff for assessment and they are found eligible for Temporary Assistance, the benefit amount may be reduced due to a penalty.

- The ET will call the designated Maximus contact to inform them that the client will be completing a telephonic DPA interview so they are available immediately for assessment.

    - Primary contact - Catherine Gregory (352-2560)
    - Secondary contact – Debbie Robinson (352-2565)

- The ET will ask the applicant(s) to remain in the DPA lobby and tell them that the Work Services staff will be with them shortly, and the wait should be no longer than five minutes.

- An OA will accept and register the TA application immediately.

  Note: The ET may not be able to get the WORK screen coded prior to the case management interview, so a paper FSSP and intake may need to be completed.

- The ET will complete the following steps to refer applicant(s) to a Work Services case manager.

    - Register the open TA applicant's EIS participation.
    - Code the WORK screen.
    - Check the JOMO screen to ensure it is in OP status for all adults in the household.
    - Carc all JAS/CMS customers to Maximus (918-9-97).
    - Print a CLPM and place it in a designated basket.

Note: Refer to Addendum B for additional information on opening CMS activity at TA application.

- If the applicant had a TA case that closed within the last 12 months (post-TA period) and is currently carc'd to DOL or Maximus, an OA will set a C-Alert "Client reapplied TA eff (Date)". The ET will not change the assigned CARC at this time and will not refer the case to a new service provider.

- If the client application is approved during the post TA period, the ET will set a C-Alert "TA reopened eff date". The ET will not change the CARC; the post-TA case manager will coordinate assignment of the open case to appropriate Maximus ESS.

c. Telephonic Interviews (when customer has not been assigned to a Work Services provider)

- The ET will complete the eligibility interview and then connect the client with a Maximus staff member for case management.

- The client will not be transferred to a Maximus staff member prior to the DPA staff member ensuring the Maximus contact has answered the phone, and has the name of the customer being routed to them.

d. "Paper People" (Clients that cannot wait to be seen by Maximus or their application was received as a mail-in or drop-off)

- An OA will register the TA application.

- The assigned ET will complete the following steps to refer applicant(s) to a Work Services case manager.
  - Register the open TA applicant's EIS participation.
  - Code the WORK screen.
  - Check the JOMO screen to ensure it is in OP status for all adults in the household.
  - Carc all JAS/CMS customers to Maximus (918-9-97).
  - Print a CLPM and place it in a designated basket.

Note: This eligibility function will be completed even if an interview cannot be completed.) Before placing the CLPM in the designated basket, ET's will write "Mail/Drop or unable to wait" on the CLPM.

- Maximus will send a notice giving the client 10 days to come in to see a case manager.

e. **Walk-In Clients (applicant or ongoing customer that has already been referred to Maximus)**

- The client will be instructed to check in at the Maximus office.

- If an ET initially denies a TA case and reconsiders the case, or if an ANI case converts to an AI case, the ET needs to notify the appropriate Maximus contact: Annia Braisher (352-4188).

- If an ET closes an ongoing TA case and then reopens the case, the ET needs to notify the current Maximus case manager that the case has been reopened.

- To be sure clients are not missed; Maximus will conduct a weekly reconciliation of the Work Services caseload report for full service office 256. If Maximus notices any trends where CLPMs are not being provided, Maximus will inform the DPA Site Manager for follow-up.

3. CENTRAL REGION STAFFING AND PENALTY COMMUNICATION GUIDE

The following procedures provide guidance for the Work Services providers and DPA Central Region eligibility technicians concerning staffing and requests for penalty actions. These procedures do not deviate from written policy, and were developed to align procedures between all offices within Central region.

a. CASE REVIEW STAFFING PROCEDURES

Reference - Alaska Temporary Assistance Manual Section 701

- **Service Review (36 Month) and Time Limit Review (48 Month) Staffing**

  DPA will continue to communicate with Work Services providers to ensure they have all the information that is needed to effectively plan for self-sufficiency and meet the outcomes of the Service and Time Limit Review staffing. Work Services providers will request information from DPA in advance of the staffing and DPA will provide it. Since eligibility technicians will no longer be assigned to specific cases and do not have unique information on specific families, it is not necessary that they attend 36 or 48 month review staffing in person or by phone.

- **Exit Staffing (58 Month)**

  The same procedures as with Service, Time Limit, and Exit Staffing will be used when the family is not requesting an extension for services and are receiving a final staffing to assist them in successfully transitioning from Temporary Assistance to self-sufficiency. Work Services providers will request information from DPA in advance of the staffing and DPA will provide it.

- **Extension Staffing (58 Months and beyond)**

  The same procedures as with Service, Time Limit, and Exit Staffing will be used when considering applicants who have used 57 or more months of assistance, recipients who have used 57 months of assistance and are asking for an extension to the lifetime limit, and recipients who are already extended and are asking for continued extension to the lifetime limit. Work Services providers will request information from DPA in advance of the staffing and DPA will provide it. DPA will be directly involved with the staffing except in those cases where a family has already provided information that leaves no question that they will be eligible for continued benefits (for instance, a single parent who has a current TA-10 that verifies they are not able to work for more than a month). DPA will support the extension staffing team to correctly extend benefits or deny extension as per ATAP policy. It is not necessary that the DPA staff member who directly participates in the staffing be a supervisor or lead worker as long as they have the necessary expertise in policy. In cases where the staffing team is not positive whether to extend or deny benefits, they will e-mail a request to DPA Policy (DPAPolicy@alaska.gov) and send a copy to the Work Services Technical Assistance mailbox (WSTA@alaska.gov) so the staffing team can receive additional support with the intent that the eligibility determination be clearly understood and correct according to ATAP policy.

b. PENALTY ACTION REQUEST

Reference: Administrative Procedures Manual, Section 109 and Alaska Temporary Assistance Manual, Section 723

This section of the procedures only discusses penalties as they pertain to the adult household members' responsibility to develop, sign, and comply with a Family Self-Sufficiency Plan and their participation in work or self-sufficiency activities. Job quit and Child Support Child Support Enforcement Division penalties are not addressed.

Staff can help families become self-sufficient while avoiding penalties by explaining Temporary Assistance expectations and the consequences of not meeting program requirements. Each family should also be given the pamphlet, *Your Best Bet: Avoid the Penalty* available at http://dpaweb.hss.state.ak.us/e-forms/pdf/ta14.pdf.

- **Requests to Impose or Lift Penalties for Developing an FSSP and Work or Self-Sufficiency Activities**

  The case manager will notify DPA about a penalty action by entering an alert followed by a case note. Sample alert entries can be found the Administrative Procedures Manual, Section 109-10.

  - **Imposing a penalty**
    Before an individual can be penalized, DPA must send a notice explaining the following information:
    - The requirement they must meet
    - The activity that must be completed and when it must be completed
    - The consequence of not meeting the requirement

    This information must be clearly stated in the case note entry made by the case manager.

  - **Lifting a Penalty**
    Penalties are ended when an individual complies with the requirement, becomes exempt from the requirement, or is determined to have good cause for not complying. When a case manger requests to end a penalty, the case note should clearly state whether the penalty is being ended, or benefits are being restored to the date the individual stated their intent to comply, had good cause, or had reason to be exempted.

4. NORTHERN REGION – FAIRBANKS AREA

a. Opening EIS Participation for All Adult Household Members in TA

- The ET will conduct the interview according to established procedures for any program.
- The ET will ensure that JOMO is opened by reviewing the CARC screen.
- If the ET denies a TA case and then reconsiders the case determination, the ET will notify the WS provider of the reconsideration if the case is later approved.

b. Referrals to Local Work Services Team

- Upon completion of an interview, the ET will call Work Services to pick up client(s) in the lobby and give the client an EPI and Case Management assessment form to complete.
- If Work Services is not available, the ET will inform the client(s) that they will be contacted by Work Services and instruct them to drop off EPI and Case Management Assessment forms in the DOL lobby (station B).
- The ET will deposit all CLPMs in the Work Services basket

c. Referrals to North Slope Case Management

To refer applicants to North Slope Case Management, the ET will:

- Process the North Slope TA application.
- Ensure that JOMO is opened by reviewing the CARC screen.
- change the case manager's CARC to 947-4-12;
- Send a W019 notice for each adult on the TA case.
  - Make sure that SP or NR's names are properly assigned to respective notices.
  - Use the adverse action calendar; give 15 days for them to contact the case manager.

Note: The new contractor information for North Slope referrals is not available at this time (October 14, 2011).

d. Referrals for Clients in Post-TA Status

- If a TA client is eligible for Post TA services (the case closed within the last 12 months), the ET will set an alert for the Post TA case manager when the case is opened. Use C-Alert "TA reopened eff. (Date)".
- The ET will not change the JAS/CMS CARC. The case management reassignment will be coordinated with the Work Services Team or contracted service providers.

e. Reconsideration of case status

- If an ET denies a TA case and then reconsiders the case determination, the ET needs to notify the Work Service provider of the reconsideration if the case is later approved.

  Note: The former provider, the Mayor's Office in Barrow's contract ended on June 30, 2011. A new contractor has been appointed, but procedures are not set as of October 7, 2011.

5. SOUTHEAST REGION

When an ATAP application is received by DPA

a. An OA will register the application immediately. An e-mail is generated to the designated individuals requesting to open the JOMO for the case manager.

b. The OA will also make sure the case is carc'd to the correct case management CARC.

c. The assigned ET will e-mail or call Center for Community (CFC) management as appropriate to let them know that there is an applicant that needs to be seen and if the client is currently in the office. The e-mail should contain the client name (both adults if a two-parent household) and identification number(s).

d. The case manager will meet with client the same day if they are available to do so. The goal is an immediate, warm hand-off from DPA to CFC.

e. The ET will make sure the client receives the EPI form with CFC's folder to complete and encourage the client to complete the form while they are waiting.

f. If the case manager has not come to get the client by the time DPA has completed the registration and interview, the client will be instructed to contact their case manager.

6. COASTAL REGION

a. All eligibility staff will refer all non-exempt TA clients on new applications and re-applications by submitting a referral letter to the applicant (J014) with a copy to the contractor upon receipt of the ATAP application. (The ET must not wait until the application is processed or pended.)

b. For two-parent families, each adult will receive their own notice. The ET will e-mail the case manager with the referral notice attached so that they can have the opportunity to work with the clients right away. When the CM receives the referral, they will carc the case to themselves for case management.

c. Penalty alerts can be received by fax or e-mail. If the case manager sets a penalty on a case that has closed, the ET will need to reopen the case, apply the penalty, and send a notice. The penalty must be in place when the client reapplies.

d. The ET will respond within 48 hours on all penalty alerts. If the case manager receives no response they will contact ETIII or ETIV. The case manager can request a penalty be set on closed cases and send notice to insure when client reapplies that the penalty is in place and ready for the new application.

e. The ET will check the coding on the WORK screen to ensure it is correct for IC/BA or any other exemptions and is set up for work services participant. Also there should be a "y' for volunteer to open up the JOMO and allow data entry into CMS. The Work Service contractor should be discussing implementation of baby exemption months or medical exemptions with the client, not the ET. The case manager can implement family self-sufficiency penalties while the client is on baby or incap exemption.

f. The ET will forward copies of all medical evidence or TA-10 to the contractor and request this information from the contractor for the eligibility file.

g. The ET will make sure that Case Notes contain all essential information about households and clients. ET's should note penalty history, job-quit, and countable ATAP months used in their interview case notes.

h. Staffing will be conducted at 36, 48, and 58 month timeframes. The ET will complete portions of the Summary and forward it to the contractor by e-mail as an attachment two weeks prior to the staffing. Portions that ETs are required to complete are: the introductory information on the first page, penalty history (WOSA), job-quit history and parts of the appointment attendance history. Also, the budget information is vital to access the client's ability to live off welfare. Therefore, this information should be as complete as possible. Information about rent, electric, and/or oil using the actual figures should be provided; and if unable make a note next to the bill they are responsible for, the contractor will get the actual figures from the client. ET's should provide information about any child support amounts should the ATAP close or if there is an UIB balance on their record.

i. The ET will need to make sure that a current Request for Child Care is received from the contractor before child care assistance is paid except for DOL contractor partners that pay their own childcare. Refer providers to the Kenai office to assure that they are licensed. They can provide them with information on steps needed to become a licensed provider.

j. The ET will check the FSSP screen to insure that there is a current FSSP on EIS. If it is not current, document the status in case notes. However, it is still the responsibility of the case manager not the ET. (Many times the Case Manager will create an addendum that is not updated in the system or provided to the case file.)

k. Upon closing ATAP, remember to send the PASS II letter to the client on all ATAP cases that have an adult included and check for transitional Medicaid eligibility. Contractors need copies of all closure notices.

l. For on-going cases, the ET needs to send a new referral letter when new household members enter the home whenever this changes the household from one-parent to two-parent to ensure that both parents receive case management services.

ADDENDUM E

CASELOAD NUMBERING STANDARDS

All regions have established a standard method of setting up caseloads based on program combinations:

(FSO)	Unit	Number	First Name	Last Name	Program(s)
Office Number	1	11	*Office Name*	Intake	All programs
Office Number	2	21	*Office Name*	Report of Change	FS/GA/GM
Office Number	2	22	*Office Name*	Report of Change	FS/FM
Office Number	2	23	*Office Name*	Report of Change	FS/FM/AP
Office Number	2	24	*Office Name*	Report of Change	FS/FM/TA
Office Number	2	25	*Office Name*	Report of Change	FS/FM/TA/AP
Office Number	2	26	*Office Name*	Report of Change	Long-Term Pend (IA/AP)
Office Number	3	31	*Office Name*	Maintenance-Intv	FS/GA/GM
Office Number	3	32	*Office Name*	Maintenance-Intv	FS/FM/GA/GM
Office Number	3	33	*Office Name*	Maintenance-Intv	FS/FM/APA/GA/GM
Office Number	3	34	*Office Name*	Maintenance-Intv	FS/FM/TA/GA/GM
Office Number	3	35	*Office Name*	Maintenance-Intv	FS/FM/TA/AP/GA/GM
Office Number	4	41	*Office Name*	Pend	FS/GA/GM
Office Number	4	42	*Office Name*	Pend	FS/FM
Office Number	4	43	*Office Name*	Pend	FS/FM/AP
Office Number	4	44	*Office Name*	Pend	FS/FM/TA
Office Number	4	45	*Office Name*	Pend	FS/FM/TA/AP
Office Number	4	46	*Office Name*	Pend	Long-Term Pend (IA/AP)
Office Number	9	99	*Control*	Clerk	

ADDENDUM F

FUNCTIONAL TEAMS' E-MAIL ADDRESS AND FAX NUMBERS

Bethel District Office

Control Clerk	HSS DPA Bethel Control Clerk	dpabethel.controlck@alaska.gov	
Intake	HSS DPA Bethel Intake Team	dpabethel.intake@alaska.gov	
Maintenance Interview	HSS DPA Bethel Maintenance Interview Team	dpabethel.maintenance@alaska.gov	543-2650
Pend	HSS DPA Bethel Pend Team	dpabethel.pend@alaska.gov	
Report of Change	HSS DPA Bethel Report of Change Team	dpabethel.reportofchange@alaska.gov	

Coastal Field Office

Control Clerk	HSS DPA Coastal Field Control Clerk	dpacoastalfield.controlck@alaska.gov	
Intake	HSS DPA Coastal Field Intake Team	dpacoastalfield.intake@alaska.gov	
Maintenance Interview	HSS DPA Coastal Field Maintenance Interview Team	dpacoastalfield.maintenance@alaska.gov	562-1619 or 1-88-266-1619 (toll-free)
Pend	HSS DPA Coastal Field Pend Team	dpacoastalfield.pend@alaska.gov	
Report of Change	HSS DPA Coastal Field Report of Change Team	dpacoastalfield.reportofchange@alaska.gov	

Denali KidCare

Control Clerk			
Intake	HSS DPA DKC Intake Team	dpadkc.intake@alaska.gov	
Maintenance Interview	HSS DPA DKC Maintenance Interview Team	dpadkc.maintenance@alaska.gov	269-0987 or 269-4612
Pend	HSS DPA DKC Pend Team	dpadkc.pend@alaska.gov	
Report of Change	HSS DPA DKC Report of Change Team	dpadkc.reportofchange@alaska.gov	

Fairbanks District Office

Control Clerk	HSS DPA Fairbanks Control Clerk	dpafairbanks.controlck@alaska.gov	451-2923 or 1-877-451-2923 (toll-free)
Intake	HSS DPA Fairbanks Intake Team	dpafairbanks.intake@alaska.gov	
Maintenance Interview	HSS DPA Fairbanks Maintenance Interview Team	dpafairbanks.maintenance@alaska.gov	
Pend	HSS DPA Fairbanks Pend Team	dpafairbanks.pend@alaska.gov	
Report of Change	HSS DPA Fairbanks Report of Change Team	dpafairbanks.reportofchange@alaska.gov	

Gambell District Office

Control Clerk	HSS DPA Gambell Control Clerk	dpagambell.controlck@alaska.gov	269-6520
Intake	HSS DPA Gambell Intake Team	dpagambell.intake@alaska.gov	269-6450
Maintenance Interview	HSS DPA Gambell Maintenance Interview Team	dpagambell.maintenance@alaska.gov	269-6329
Pend	HSS DPA Gambell Pend Team	dpagambell.pend@alaska.gov	269-6520
Report of Change	HSS DPA Gambell Report of Change Team	dpagambell.reportofchange@alaska.gov	269-6329

Juneau District Office

Control Clerk	HSS DPA Juneau Control Clerk	dpajuneau.controlck@alaska.gov	465-4657
Intake	HSS DPA Juneau Intake Team	dpajuneau.intake@alaska.gov	
Maintenance Interview	HSS DPA Juneau Maintenance Interview Team	dpajuneau.maintenance@alaska.gov	
Pend	HSS DPA Juneau Pend Team	dpajuneau.pend@alaska.gov	
Report of Change	HSS DPA Juneau Report of Change Team	dpajuneau.reportofchange@alaska.gov	

Kenai District Office

Control Clerk	HSS DPA Kenai Control Clerk	dpakenaicontrolck@alaska.gov	283-6619 or 1-888-248-6619 (toll-free)
Intake	HSS DPA Kenai Intake Team	dpakenai.intake@alaska.gov	
Maintenance Interview	HSS DPA Kenai Maintenance Interview Team	dpakenai.maintenance@alaska.gov	
Pend	HSS DPA Kenai Pend Team	dpakenai.pend@alaska.gov	
Report of Change	HSS DPA Kenai Report of Change Team	dpakenai.reportofchange@alaska.gov	

Ketchikan District Office

Control Clerk	HSS DPA Ketchikan Control Clerk	dpaketchikan.controlck@alaska.gov	247-2135
Intake	HSS DPA Ketchikan Intake Team	dpaketchikan.intake@alaska.gov	
Maintenance Interview	HSS DPA Ketchikan Maintenance Interview Team	dpaketchikan.maintenance@alaska.gov	
Pend	HSS DPA Ketchikan Pend Team	dpaketchikan.pend@alaska.gov	
Report of Change	HSS DPA Ketchikan Report of Change Team	dpaketchikan.reportofchange@alaska.gov	

Kodiak District Office

Control Clerk	HSS DPA Kodiak Control Clerk	dpakodiak.controlck@alaska.gov	486-3116 or 1-888-281-3116 (toll-free)

Kotzebue District Office

Control Clerk	HSS DPA Kotzebue Control Clerk	dpakotzebue.controlck@alaska.gov	442-2151

Long-Term Care Unit

Control Clerk	HSS DPA Coastal LTC Control Clerk	dpacoastalltc.controlck@alaska.gov	562-1619 or 1-888-266-1619 (toll-free)
Intake	HSS DPA Coastal LTC Intake Team	dpacoastalltc.intake@alaska.gov	
Maintenance Interview	HSS DPA Coastal LTC Maintenance Interview Team	dpacoastalltc.maintenance@alaska.gov	
Pend	HSS DPA Coastal LTC Pend Team	dpacoastalltc.pend@alaska.gov	
Report of Change	HSS DPA Coastal LTC Report of Change Team	dpacoastalltc.reportofchange@alaska.gov	

Mat-Su District Office

Control Clerk	HSS DPA MatSu Control Clerk	dpamatsu.controlck@alaska.gov	373-1136 or 357—2538 or 1-877-357-2538 (toll-free)
Intake	HSS DPA MatSu Intake Team	dpamatsu.intake@alaska.gov	373-1136 or 1-877-357-2538 (toll-free)
Maintenance Interview	HSS DPA MatSu Maintenance Interview Team	dpamatsu.maintenance@alaska.gov	373-1136 or 357—2538 or 1-877-357-2538 (toll-free)
Pend	HSS DPA MatSu Pend Team	dpamatsu.pend@alaska.gov	373-1136 or 1-877-357-2538 (toll-free)
Report of Change	HSS DPA MatSu Report of Change Team	dpamatsu.reportofchange@alaska.gov	357—2538 or 1-877-357-2538 (toll-free)

Muldoon District Office

Control Clerk	HSS DPA Muldoon Control Clerk	dpamuldoon.controlck@alaska.gov	269-6029
Intake	HSS DPA Muldoon Intake Team	dpamuldoon.intake@alaska.gov	
Maintenance Interview	HSS DPA Muldoon Maintenance Interview Team	dpamuldoon.maintenance@alaska.gov	
Pend	HSS DPA Muldoon Pend Team	dpamuldoon.pend@alaska.gov	
Report of Change	HSS DPA Muldoon Report of Change Team	dpamuldoon.reportofchange@alaska.gov	

Nome District Office

Control Clerk	HSS DPA Nome Control Clerk	dpanome.controlck@alaska.gov	443-2307 or 1-888-574-2307 (toll-free)
Intake	HSS DPA Nome Intake Team	dpanome.intake@alaska.gov	
Maintenance Interview	HSS DPA Nome Maintenance Interview Team	dpanome.maintenance@alaska.gov	
Pend	HSS DPA Nome Pend Team	dpanome.pend@alaska.gov	
Report of Change	HSS DPA Nome Report of Change Team	dpanome.change@alaska.gov	

Senior Benefits

Control Clerk	HSS DPA Senior Benefits Control Clerk	dpaseniorbenefits.controlck@alaska.gov	357-2561 or 1-866-352-8539 (toll-free)
Intake	HSS DPA Senior Benefits Intake Team	dpaseniorbenefits.intake@alaska.gov	
Maintenance Interview	HSS DPA Senior Benefits Maintenance Interview Team	dpaseniorbenefits.maintenance@alaska.gov	
Pend	HSS DPA Senior Benefits Pend Team	dpaseniorbenefits.pend@alaska.gov	
Report of Change	HSS DPA Senior Benefits Report of Change Team	dpaseniorbenefits.reportofchange@alaska.gov	

Sitka District Office

Control Clerk	HSS DPA Sitka Control Clerk	dpasitka.controlck@alaska.gov	747-8224
Intake	HSS DPA Sitka Intake Team	dpasitka.intake@alaska.gov	
Maintenance Interview	HSS DPA Sitka Maintenance Interview Team	dpasitka.maintenance@alaska.gov	
Pend	HSS DPA Sitka Pend Team	dpasitka.pend@alaska.gov	
Report of Change	HSS DPA Sitka Report of Change Team	dpasitka.reportofchange@alaska.gov	

ADDENDUM G

NEXT DAY APPOINTMENT LETTERS

- **CENTRAL REGION**

STATE of ALASKA
Department of Health and Social Services

Welcome to the Division of Public Assistance

Since you were unable to stay for an in person interview, we will be contacting you by phone for your interview.

We will make every attempt to contact you today; if we are not able to reach you today, we may continue trying to contact you up until your scheduled interview time.

Your scheduled telephone interview is at 9:30am tomorrow. Date: ____________________

Please contact us right away if you have any questions or miss your scheduled interview.

Gambell Office 269-6599

Muldoon Office 269-0001

Mat-Su Office 376-3903

Thank you for your cooperation.

____

I will be available to receive your call today or tomorrow at this number:

Client's Name: __________________________ Best Contact Number________________

Welcome to the Division of Public Assistance

Since you were unable to stay for an in person interview, we will be contacting you by phone for your interview.

We will make every attempt to contact you today; if we are not able to reach you today, we may continue trying to contact you up until your scheduled interview time.

Your scheduled telephone interview is at 3pm tomorrow. Date: ______________________

Please contact us right away if you have any questions or miss your scheduled interview.

Gambell Office 269-6599

Muldoon Office 269-0001

Mat-Su Office 376-3903

Thank you for your cooperation.

____

I will be available to receive your call today or tomorrow at this number:

Client's Name: ________________________ Best Contact Number_______________

- **NORTHERN REGION**

State of Alaska
Department of Health & Social Services
675 7th Avenue Station D
Fairbanks, Alaska 99701
Toll Free 800-478-2850
Direct 907-451-2850
Fax 907-451-2923

Since you were unable to stay for an in-person interview today, we will be contacting you ***by telephone*** to complete your interview.

Your interview is scheduled for:

Date: ______________________________

Time: 3:00 p.m.

If time permits, you may be contacted earlier than the scheduled time. It is not a requirement to be available all day but the sooner we can get your interview done, the better for you. If you do not hear from our office earlier than the scheduled time, please make sure you are available on the date and time listed above.

If you are not available at the scheduled time, your benefits may be denied.

- **COASTAL REGION**

State of Alaska
Department of Health & Social Services
Division of Public Assistance
460 Ridgecrest Drive
P.O. Box 365
Bethel, Alaska 99559
(907) 543-2686
1-800-478-2686
Fax 907-543-2650
Toll free Fax 1-888-478-2650

Welcome to the Division of Public Assistance

Since you are unable to stay for an in person interview today we will be contacting you by phone to complete your required interview.

We will make every attempt to contact your today for your telephone interview. If we are unable to contact you for any reason today, we will call you at __________ am / pm tomorrow to complete your scheduled interview.

Your scheduled telephone interview is at __________ am / pm Date: ________________

Please contact us right away if you have any questions or miss your scheduled interview time.

Local Bethel District office	**(907) 543-2650**
Long Distance toll free	**1-888-478-2650**

I understand that I must provide all the information and verification that apply to my application. I must attend an interview otherwise my benefits may be delayed or denied.

Signature: ____ Date:__________________

Thank you for your cooperation.

- **SOUTHEAST REGION**

STATE OF ALASKA

DEPT. OF HEALTH AND SOCIAL SERVICES

DIVISION OF PUBLIC ASSISTANCE

SEAN PARNELL, GOVERNOR

JUNEAU DISTRICT OFFICE
10002 GLACIER HWY, SUITE 200
JUNEAU, ALASKA 99801
PHONE: (907) 465-3537
TOLL FREE: (907) 478-3537
FAX: (907) 465-4657

Welcome to the Division of Public Assistance

Since you are unable to stay for an in-person interview today, we will contact you by phone to complete your required interview.

Your scheduled telephone interview is at _____ am/pm on ______________

We may try to contact you by telephone earlier than this.

If you do not hear from us by your scheduled phone interview time, please call us at the numbers below:

Juneau District Office	(907) 465-3537	800-478-3537
Ketchikan District Office	(907) 225-2135	800-478-2135
Sitka District Office	(907) 747-8234	800-478-8234

A personal interview is required before we can determine if you are eligible for assistance. Your application may be denied if you do not attend an interview.

I understand that I must attend an interview (either in-person, by telephone, or with a fee agent).

SIGNATURE:__________________________ DATE: ________________

Do you have questions about your case?
Call our Question and Answer Desk!
(907) 465-4946

We've changed the way we do business so that we are more available to answer your questions. If you have questions about your case, questions about information we have requested, or need to report a change, the Question and Answer Desk is the place to call.

STATE OF ALASKA

DEPT. OF HEALTH AND SOCIAL SERVICES
DIVISION OF PUBLIC ASSISTANCE

SEAN PARNELL, GOVERNOR

SITKA DISTRICT OFFICE
201 KATLIAN STREET, SUITE 107
SITKA, ALASKA 99835
PHONE: (907) 747-8234
TOLL FREE: (800) 478-8234
FAX: (907) 747-8224

Welcome to the Division of Public Assistance

Since you are unable to stay for an in-person interview today, we will contact you by phone to complete your required interview.

Your telephone interview is at __________________

We will try to contact you by telephone earlier than this.

If you do not hear from us by your scheduled phone interview time, please call us at the number below:

Sitka District Office
(907) 747-8234 or 1-800-478-8234

A personal interview is required before we can determine if you are eligible for assistance. Your application may be denied if you do not attend an interview.

I understand that I must attend an interview (either in-person, by telephone, or with a fee agent).

SIGNATURE: ______________________________
DATE: ____________________