

Call Center Food Stamp On-the-Job Training Guide

Revised November 15, 2005

Call Center FS OJT Guide – Table of Contents

Contents	Page No.
Letter to the Classroom Instructor	3
Letter to the Case Manager	4-6
Letter to the Supervisor	7-9
Call Center FS OJT Schedule	10-15
Review of Policies Not Covered in Training	
Battered Woman and Children	16
Residents of Drug and Alcohol Treatment Centers	17
Residents of Group Living Arrangements	18-19
Homeless Assistance Units	20
Seasonal Farm Workers	21
Strikers	22
Telephone Call Receipt/Change Processing	
The Trainee's Observations	23
Receiving Calls	24
OJT Task Log	25-26

To the FS Phase I and II classroom instructor:

Upon successful completion of Phases I and II of FS training, trainees will return to their home office, where they will complete a two-week on-the-job training before being allowed to begin Family Medicaid training. You have an important role to play in helping to ensure the success of the OJT experience by emphasizing to your students the importance of OJT and how it will help them when they complete training and begin work in the county.

A copy of the OJT Guide is available to each trainee at the Education and Training Services Section website at http://www.gadfcs.org/ofc/ofc_hbk.html. Please inform trainees of where they can obtain a copy of the OJT guide. No trainee will be allowed to attend Phases I and II of the Family Medicaid training until OJT has been completed.

Make sure that trainees and supervisors understand that the OJT is part of the training sequence; the OJT participant is still in training. Also, inform the trainees that they will have to email the remote instructor every two days to update the instructor on the OJT tasks that have been completed.

A copy of the class roster for FS Phases I and II must be faxed during the first week of the class to the OFI Curriculum Development Unit at 2 Peachtree. The roster must include the names of all of the students in the class, their email addresses and phone numbers, their supervisors' names, and the supervisors' email addresses and phone numbers. The fax number for the OFI Unit is 404-657-4058.

To the new case manager:

Congratulations on having successfully completed Phases I and II of the New Eligibility Worker training. Or, you may have completed the policy portion of FS training online before attending Phase II training in the SUCCESS lab.

However you may have reached this point, you will now have two weeks of on-the-job training in your office before attending Family Medicaid training. At this point, you may feel overwhelmed and a little intimidated about your new job. Or, perhaps you're just ready to be done with training and "get to work".

We assume that you are anxious to begin work at the Call Center, and recognize that it may be tempting to bypass the OJT activities so that you can begin your "real work." However, this OJT component has been implemented because the Education and Training Services Section has responded to requests from throughout the state for an OJT that is tied to classroom training.

Phases I and II of FS training provide a significant part of what you'll need to know in order to adequately manage your work load, but it does not give you everything you will need to know. In the long run, you and the families you'll be serving will benefit from your completion of OJT. We are convinced that completing OJT will make you a more informed, more confident, more productive and more independent worker than one who has not completed OJT. Consequently, completion of OJT is not optional, but is required before you can attend Family Medicaid training.

The OJT component is scheduled to last for two weeks, but it is estimated that only 40 hours of your time will be needed during that two-week period. Therefore, you will have time to do other work during these two weeks. You must complete the required components of OJT. How you use the other 40 hours during the two-week period is for you and your supervisor to decide.

This OJT guide is intended to direct you in particular activities so you can

- learn about Call Center-specific information such as completion of logs and reports, call processing procedures, and office resources
- learn about areas not taught in FS Phase I training such as special assistance units, students and aliens, and
- reinforce the information already learned in FS Phase I training, including policy, documentation and interview skills.

During OJT, an experienced case manager or managers will be assigned to be your mentor(s). The person assigned to help you was selected because s/he:

- has good interview skills
- wants to work with you
- documents case records well, completes needed reports timely and accurately, and
- demonstrates a positive attitude toward clients and job responsibilities.

This OJT guide lists policies for which you received no instruction during Phase I training. You will not complete all of these topics during OJT. The OJT Task Log (pages 25-26) specifies all of the tasks that can be completed during OJT. Some of the tasks listed may not need to be completed based on circumstances unique to the Call Center. Your supervisor will decide which of the non-mandatory tasks you will need to complete.

During OJT, you will need to complete the internet training module entitled “Students.” This module can be accessed at <https://www.gadfcs.org/training/index.html>.

Some of the assigned tasks will be quite simple and can be completed quickly. Other activities, such as observing and taking calls and processing the reported changes, will take several days. Though some activities are assigned to specific days, your most important activity during OJT will be to observe your mentor taking calls and processing changes and taking calls and processing changes yourself. When you complete the other activities can be adjusted as needed around the time you spend observing and taking phone calls.

As you complete training on a topic listed in this guide, the date on which that training is completed must be recorded by either you or your supervisor on the OJT Task Log on the last two pages of this guide. The record of training will be retained in your productivity file by your supervisor.

A member of the OFI Curriculum and Training Development Unit in DFCS’ Education and Training Services Section will act as your remote instructor during OJT. During OJT, you will need to send to the remote instructor an email every two days to OFIOJT@dhr.statega.us , reporting the OJT tasks you have completed. Your remote instructor will send questions for you to answer about your OJT experiences.

See the “OJT Task List” on pages 10-14. Complete only those your supervisor assigns. For each of the policy areas assigned, you will need to complete an exercise. Send your answers to the questions in the exercises via email to OFIOJT@dhr.state.ga.us. Your supervisor will sign off on the OJT Task Log as you complete tasks. A copy of this log will be kept by your supervisor in your productivity file.

The day before the last day of your OJT, contact your remote instructor to let her know that you’ve completed OJT. This email will serve as notice to UGA to send your FS Certificate, allowing you to attend Family Medicaid training. If you do not complete OJT, you cannot attend Medicaid training.

When you come to the first day of Family Medicaid training, bring a copy of your OJT Task Log, signed and dated by your supervisor. On the first of class, you will be given an opportunity to discuss your OJT experience and ask questions.

If you have questions or concerns during OJT, send them to the remote instructor at OFIOJT@dhr.state.ga.us.

To the supervisor:

Your new employee has just completed Phases I and II of the New Eligibility Worker training. The first phase included training in casework skills, policy, and procedures for the Food Stamp Program. The second phase included training on SUCCESS as well as additional interview skills training. Now the trainee will have a two-week on-the-job training in the office before attending Family Medicaid training.

We assume that you are anxious to have your newly-trained worker begin work on his/her caseload, and recognize that it may be tempting to bypass the OJT activities so that your new worker can get to the “real work.” However, the OJT component has been implemented because the Education and Training Services Section has responded to requests from the counties for OJT that is tied to classroom training.

Phases I and II of FS training provide a significant part of what the trainee needs to know in order to adequately manage a caseload, but it does not give the trainee everything s/he will need to know. In the long run, the trainee and the families served by the Call Center will be better-served if the trainee completes OJT. We are convinced that completing OJT will make your worker more informed, more confident, more productive and more independent than one who has not completed OJT. Consequently, completion of OJT is not optional, but is required before you can attend Family Medicaid training.

The OJT component is scheduled to last for two weeks, but it is estimated that only 40 hours of the trainee’s time will be needed during that two-week period. Therefore, the trainee will have time to work on other things during these two weeks that demand immediate attention. The trainee must complete the required components of OJT. How the trainee uses the other 40 hours during the two-week period is for you to decide.

This OJT guide is intended to guide you and the trainee in particular activities for the purpose of:

- learn about Call Center-specific information such as completion of logs and reports, call processing procedures, and office resources
- learn about areas not taught in FS Phase I training such as special assistance units, students and aliens, and
- reinforce the information already learned in FS Phase I training, including

policy, documentation and interview skills.

You will need to assign an experienced worker (or workers) to mentor the trainee during the two-week OJT period. The person assigned to mentor the trainee will play a critically important role. Be sure to choose someone who:

- has good interview and call-processing skills
- has an interest in working with the trainee
- documents well and completes needed reports timely and accurately
- displays a positive attitude toward clients and job responsibilities.

At the conclusion of FS training, the trainee was told about the required OJT and was either given a copy of this guide or told where it could be downloaded. This OJT guide lists the policies on which no instruction was provided during Phase I training. The trainee will not complete all of these topics during OJT.

The OJT Task Log (pages 25-26) specifies all of the tasks that can be completed during OJT. Some of the tasks listed will not need to be completed based on circumstances unique to the call center. Some assigned tasks will be quite simple and can be completed quickly. Other activities, such as observing and taking calls and processing the reported changes, will take several days. You will decide which of the non-mandatory tasks the trainee needs to complete.

The trainee will need to complete the internet training module entitled “Students.” This module can be accessed at <https://www.gadfcs.org/training/index.html>.

A member of the OFI Curriculum and Training Development Unit in DFCS’ Education and Training Services Section will act as the trainee’s remote instructor during OJT. Every two days during OJT, the trainee will need to email the remote instructor at OFIOJT@dhr.statega.us to report the OJT tasks that have been completed. The remote instructor will send questions for the trainee to answer.

Refer to the “OJT Task List” on pages 10-14. Assign only those you think the trainee needs to complete. For each of the policy areas assigned, the trainee will need to complete an exercise (these begin on p. 15) and send the answers to the questions in the exercises via email to OFIOJT@dhr.statega.us.

The OJT Task Log is where the completion of the trainee's OJT assignments will be recorded by you, the mentor or the trainee. When the trainee has completed all of the tasks you have assigned, sign and date the second page of the OJT Task Log. Your signature is required to verify that all assigned tasks have been completed and the trainee is ready to attend Family Medicaid training. Retain a copy of the log in the trainee's productivity file. A second copy of this log will be turned in by the trainee on the first day of Family Medicaid training.

The day before the last day of OJT, the trainee should contact the remote instructor to let her know that OJT has been completed. UGA will then be notified to send the FS Certificate to the trainee, allowing the trainee to attend Family Medicaid training.

On the first day of class for Family Medicaid Phase I, the trainee must bring a copy of the OJT Task Log, signed and dated by you. All of the trainees will be given an opportunity to discuss their OJT experiences and ask questions.

Thank you for your support of this crucial part of the Food Stamp training. If you have questions, concerns, or suggestions about the FS OJT, please contact Wallace King in the Education and Training Unit at wbking@dhr.state.ga.us.

CALL CENTER FS OJT SCHEDULE

Day 1

A. Conference with Supervisor

1. The supervisor will review the trainee's training experiences and answer any questions the trainee may have.
2. The supervisor will, if needed, give the trainee a tour of the office and introduce the trainee to other staff.
3. The supervisor will introduce the trainee to the assigned mentor(s).
4. The supervisor will review the task list and make assignments based on office needs and circumstances, notifying the online instructor at the state office on the day the assignments are made.
5. The mentor will explain how to complete routine logs and reports.
6. The trainee will attend training on macros and on the completion of online logs
7. The trainee will review case actions completed by Call Center agents, noting how documentation standards are met.

B. Preparation of Work Space

The trainee will check the equipment and supplies provided and determine if additional supplies are needed.

Day 2

A. Policy and Procedural Training.

1. The trainee will review the “Changes,” “Communication” and “Shelter” sections in the Call Center Procedure Manual
2. The trainee will complete the online Food Stamps Shelter Policy Training module.

B. Case Documentation

1. The trainee will review documentation requirements and Macros, using the information provided during FS Phase I training.
2. The trainee will read several changes completed by the mentor, noting how or if documentation standards have been met.

C. Trainee Observations

Observe other agents taking calls and processing changes (answer the questions on p. 23 of the guide).

Day 3

A. Telephone Training

1. The trainee will be introduced to the phone system and will review the user guide.
2. To develop telephone skills, the trainee will take incoming calls on the address-only lines, assisted by the mentor and/or supervisor.

B. Caseload Management

With the designated mentor, the trainee will discuss how to manage the workload, how to report and record work, etc.

C. Communication Procedures

With the help of the supervisor or mentor, the trainee will learn the Call Center procedures for communicating with the counties, especially concerning changes that require additional action by the county.

Day 4

Telephone Training (cont.)

The trainee will continue the telephone training begun on Day 3.

Day 5

Telephone Training (cont.)

The trainee will continue the telephone training from Day 4.

Day 6

A. Supervisor Conference

The trainee will review with the supervisor the changes processed by the trainee, and read by the supervisor and/or mentor, based on calls received during telephone training.

B. Policy Training

1. The trainee must complete the Food Stamps Student Policy Training module.
2. With the mentor's assistance, the trainee will access the EBT website and will review EBT card replacement procedures.

Day 7

Policy Training (cont.)

During FS Phase I training, several specific assistance unit types were not taught because not all counties have significant populations of these groups.

Because, when working in the Call Center, the trainee can expect to deal with AUs involving any of the categories below, the trainee should read the policy manual material related to these categories and answer the basic policy questions included in this guide.

The policy areas are:

1. Battered Women and Children – FS policy manual, Chapter 3215
2. Residents of Drug and Alcohol Treatment Centers – FS policy manual, Chapter 3220
3. Residents of Group Living Arrangements – FS policy manual, Chapter 3225
4. Homeless Assistance Units – FS policy manual, Chapters 3230 and 3205
5. Seasonal Farm Workers – FS policy manual, Chapter 3235
6. Strikers – FS policy manual, Chapter 3240.
7. Students – FS policy manual, Chapter 3245 (the trainee will learn this policy via the online training module).

If, during any of the telephone calls the trainee observes or receives, questions are raised concerning any of the following policy areas, the trainee should read the relevant material in the policy manual and review it with the mentor or supervisor.

1. Voluntary quit
2. Jointly-owned resources
3. Self-employment
4. Medical deductions
5. Untimely reported changes
6. Processing changes when verification is not provided or is provided untimely.

Day 8

Telephone Training

Using telephone skills, the trainee will take calls on the address-only lines accompanied by the mentor or supervisor.

Day 9

Telephone Training (cont.)

The trainee will continue the telephone training from Day 8.

Day 10

A. Conference with Supervisor

1. The trainee will review with the supervisor the changes processed by the trainee, and read by the supervisor and/or mentor, based on calls received during telephone training.
2. The trainee will review policy pertaining to expedited changes and multiple changes

B. Medicaid Preview

The trainee will read about basic Medicaid eligibility criteria found on the Department of Community Health (DCH) website. The website can be accessed at <http://www.communityhealth.state.ga.us/>. The material can be accessed by clicking on “Programs” on the upper left side of the main page, and then by clicking on “Medicaid.” Under “Medicaid,” the trainee will click on “Eligibility Criteria” and read all of the information on that page.

Policy Review
Battered Women and Children
FS Policy Manual – Chapter 3215

1. In order for an AU to receive FS under this policy, what must be verified about the shelter in which it is residing?

2. FS Policy does not normally allow an individual to receive two separate FS allotments in the same month. How is the policy for battered women an exception to this rule?

3. How do we treat the resources jointly owned by the battered woman and the abuser?

4. What shelter expenses might an AU have while living in a shelter?

5. What should be done if the abuser receives FS?

6. To what county should the FS case be assigned if the AU is living in a shelter?

Policy Review
Residents of Drug and Alcohol Treatment Centers
FS Policy Manual – Chapter 3220

1. Name the four specific steps a resident of a treatment center must take in order to be eligible for benefits:

2. In order for the resident to be certified for benefits, the organization/center must obtain a non-profit private tax status or be publicly operated. Policy mentions several additional requirements for the center. What are these?

3. When the AU leaves the center, what portion of the EBT allotment will it receive for the month of departure? (The center should be familiar with this policy, but the client may have a question about this.)

4. If the family of the client who is receiving treatment resides with the client at the treatment center, how is it determined whether the family is eligible for FS?

Policy Review
Residents of Group Living Arrangements
FS Policy Manual – Chapter 3225

1. A resident of a personal care home may apply for benefits in one of the following ways:

A resident may have a(n) _____ apply for and/or receive benefits on his/her behalf in the county in which _____.

A resident may apply as an assistance unit of one or a(n) _____ with a resident member of the group applying on behalf of the group.

A resident who applies through a personal care home's authorized representative must apply as an AU of _____.

2. A resident must meet all _____ and _____ eligibility criteria.

3. In order for a resident of a personal care home to be eligible for benefits, the program/organization that operates the home must meet a number of requirements. Ask your supervisor or assigned mentor about the treatment centers you may be working with, and list those here:

4. If the resident leaves the home and an employee of the home is the authorized representative who receives and uses benefits on behalf of the AU, the home must take the following steps (the center should be familiar with this policy, but when your client leaves the home she may have questions about how much of the FS allotment is available to the AU):

If the resident leaves the home at any time and no portion of the monthly allotment has been spent, the _____ must remain in the EBT account.

If the resident leaves the home on or before the 15th of a month, _____ of the monthly allotment must remain in the EBT account.

If the resident leaves the home on or after the 16th of the month, any _____ of the monthly allotment must remain in the EBT account.

If an employee of the personal care home is the authorized representative and the resident leaves the home, the employee _____ continue to act as the authorized representative.

Residents of Group Living Arrangements (cont.)

5. Room/board supplements and personal allowance payments are _____ (countable or non-countable) income in the FS Program.

6. If the resident member pays for shelter and meals in a combined amount, determine shelter/utility costs by deducting the _____ for a one-person AU from the _____.

7. Allow medical expenses as deductions if the facility or resident can provide _____ and the expenses are identified _____.

Review several cases with AU members residing in group living arrangements.

Policy Review
Homeless Assistance Units
FS Policy Manual – Chapter 3230

1. Can a homeless individual or family receive Food Stamps?
2. Individuals are considered residents of a homeless shelter if the primary nighttime residence is one of the following:
3. If an individual receives meals at a shelter, does that prevent him from receiving Food Stamps?
4. What period of eligibility should be assigned to a homeless AU?
5. For FS purposes, can an individual be regarded as “homeless” while residing in the home of another person?
6. For what period of time may an individual be considered homeless while residing in the home of another person?

Policy Review
Seasonal Farm Workers
FS Policy Manual – Chapter 3235

1. What is the definition of a migrant or seasonal farm worker?

2. Is a seasonal farm worker required to be absent from his permanent place of residence?

3. Define “destitute”:

4. There are three situations in which a seasonal farm worker can change jobs without the income being treated as a terminated or new source of income. What are they?
 - a.

 - b.

 - c.

5. How do you make the determination about whether to count or exclude travel expense income?

6. What two program exemptions are applied to a migrant or seasonal farm worker AU?

Policy Review
Strikers
FS Policy Manual – Chapter 3240

1. How is eligibility determined for an AU that includes an individual on strike?

2. How do you determine the amount of income to budget?

3. List 5 examples of individuals who are NOT regarded as strikers according to FS policy.
 - a.
 - b.
 - c.
 - d.
 - e.

4. What do you do with the AU's POE if an AU member goes on strike?

Telephone Call Receipt/Change Processing The Trainee's Observations

1. Did the worker you observed have the online log available and ready to document the caller's information at the beginning of the call?
2. Did the worker greet the caller properly?
3. Did the worker verify the caller's name, SSN, address and phone number, etc., repeating back the information to the caller?
4. Did the worker offer to assist the caller?
5. If the caller needed to be transferred to another agent, did the worker you observed handle the process correctly?
6. Did the worker repeat back to the caller the change and information being reported?
7. Did the worker ask open-ended questions of the caller, attempting to elicit more information?
8. Did the worker explain to the caller ways by which the change could be verified?
9. Did the worker explain to the caller the action that was being taken on the case based on the reported change?
10. Did the worker end the call with a positive statement, thanking the caller for reporting the change and reminding the caller to report future changes in a timely manner?

Telephone Call Receipt/Change Processing Receiving Calls

1. Did you have the online log available and ready to document the caller's information at the beginning of the call?
2. Did you greet the caller properly?
3. Did you verify the caller's name, SSN, address and phone number, etc., repeating back the information to the caller?
4. Did you offer to assist the caller?
5. If the caller needed to be transferred to another agent, did you handle the process correctly?
6. Did you repeat back to the caller the change and information being reported?
7. Did you ask open-ended questions of the caller, attempting to elicit more information?
8. Did you explain to the caller ways by which the change could be verified?
9. Did you explain to the caller the action that was being taken on the case based on the reported change?
10. Did you end the call with a positive statement, thanking the caller for reporting the change and reminding the caller to report future changes in a timely manner?

OJT TASK LOG

Orientation and Call Center Procedures	Date Completed
Conference with supervisor	
Preparation of work space	
Case record organization	
Telephone system review and practice	
Communication procedures	
Additional policy and computer training	Date Completed
EBT	
Alerts	
Battered women and children*	
Residents of substance abuse treatment facilities*	
Residents of group homes*	
Homeless assistance units*	
Seasonal farm workers*	
Strikers*	
Students*	
Voluntary quit**	
Jointly-owned resources**	
Self-employment**	
Medical deductions**	
Untimely reported changes**	
Processing changes when verification is not received or received untimely**	
Medicaid information – review on the Dept. of Community Health website	

*The supervisor will tell the trainee which of these topics to complete based on the perceived need in the county.

**Training is completed in these areas only if the opportunity arises during OJT.

OJT TASK LOG (cont.)

Telephone/interview skills development	Date Completed
Observe the call-in process	
Observe the call-in process	
Observe the call-in process	
Observe the call-in process	
Observe the call-in process	
Observe the call-in process	
Observe the call-in process	
Observe the call-in process	
Receive/process a call	
Receive/process a call	
Receive/process a call	
Receive/process a call	
Receive/process a call	
Receive/process a call	
Receive/process a call	
Receive/process a call	
Receive/process a call	
Receive/process a call	

The signature of the trainee’s supervisor verifies that all required tasks have been completed, and the trainee is ready to attend Family Medicaid Phase I training.

Supervisor's signature

Date