

PROGRAM TRACKING SPECIALIST RECORDS REVIEW SUMMARY

Tracker Name: _____

Circle Current Month – Oct., Nov., Dec., Jan., Feb., March, April, May, June, July, Aug., Sept.

*Performance measures are cumulative for the review period- usually one year.

I. Recruitment/Outreach– Measured once monthly

Function	Number Required
1. Recruitment letters are sent to all customers who must participate <u>Or</u> appropriate action is taken for mandatory customers in pool who do not require a letter (correct record, re-open case, etc) (TANF)	Number in TWIST outreach pools with Mandatory work codes - ___ Number with appropriate action taken (letter sent, correction made, etc) - ___
2. Recruitment letters are sent to all customers who must participate (FSE&T ABAWDS)	Number in TWIST outreach pools who are to be sent recruitment letters - ___ Number with letters - ___
3. Recruitment letters are sent to all customers with work code 3- Mandatory-Not working (FSE&T General Population)	Number in TWIST outreach pools who are to be sent recruitment letters - ___ Number with letters - ___
4. Recruitment letters are sent to customers in the UI Profiling pool and responses marked	Number in the pool for assigned zip codes - ___ Number of letters sent - ___

Total in TWIST and Profile outreach pools (from 1, 2, 3 & 4 as applicable) = ___
Total number of letters sent *or* correct action taken (from 1, 2, 3 & 4 as applicable) = _

Total to date of number in outreach pools (this month plus previous months in this review period) = ___
Total to date of number of letters sent *or* correct action taken (this month plus previous months in this review period) = ___

Performance to date = ___
Cumulative total of number of letters sent
Cumulative total of numbers in outreach pools

Supervisor will circle the applicable performance from the formula above
Outstanding - 99% -100%
Proficient - 90% - 98%
Unacceptable – 89% or lower

PROGRAM TRACKING SPECIALIST RECORDS REVIEW SUMMARY

II. Appropriate Action taken in response to recruitment:

1. Action taken on all recruitment letters sent to customers who must participate (TANF)	Number letters sent as listed in I. Recruitment - ___ Number with appropriate action - ___
2. Action taken on recruitment letters sent to customers who must participate (FSE&T AWABDS)	Number letters sent as listed in I. - ___ Number with appropriate action - ___
3. Action taken on recruitment letters sent to others required by management (FSE&T General Population)	Number letters sent as listed in I. - ___ Number with appropriate action - ___
4. Action taken on recruitment letters sent to customers in the UI Profiling pool	Responses noted – <input type="checkbox"/> Yes <input type="checkbox"/> No

Total of letters sent (from 1, 2, 3 as applicable) = ___
 Number with Appropriate Action (from 1,2,3 as applicable) = ___

Cumulative number of letters sent to date (this month plus previous months in review period) =
 Cumulative number of appropriate actions (this month plus previous months in review period) =

Performance to date =
Cumulative number of appropriate actions
 Cumulative number of letters sent

Supervisor will circle the applicable performance from the formula above
 Outstanding - 99% - 100% and answer “yes” in second row when applicable
 Proficient - 90% - 98% and answer “yes” in second row when applicable
 Unacceptable – 89% or lower or answer “no” to responses noted in number 4

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III. Data Entry

Initial Record - Timelines	Sample size – <u>20</u> Number of records entered no later than the day after receipt - ___
Initial Record – Accuracy	Sample size – same <u>20</u> Number with all items accurately entered - ___

Total sample this month = 40
Total this month that are both timely and accurate =

Cumulative number sampled from previous months =
Cumulative total from previous months that were both accurate and timely =

Performance to date =
Total timely and accurate this month + total timely and accurate previous months
Sample this month (40) + cumulative number sampled from previous months

Supervisor will circle the applicable performance from the formula above
Outstanding – 95% to 100 %
Proficient – 85% to 94%
Unacceptable – 84% or below

IV. Continued Tracking

1. TANF applicants certified have Choices services opened within two days of certification	Sample size – <u>10</u> Number with services opened within two days of certification - ___
2. Letters of non-cooperation are sent to those not fully in compliance by the third Monday of the month	Sample size - ___ Number with letters sent - ___
3. Appropriate action is taken by the 8 th day after the above letters are sent	Sample size - ___ Number with appropriate action - ___
4. The “next step letter” is sent informing the customer that she must spend time in something other than job search to retain her TANF cash benefits	Sample size - ___ Number who have letter sent by Tues. of the week before customer must enter an activity in addition to job search - ___

PROGRAM TRACKING SPECIALIST RECORDS REVIEW SUMMARY

Total sample this month (1-4 above) = __
 Total done correctly (1-4 above) = __
 Total sampled from previous months in this review period = __
 Total done correctly from previous months this review period = __

Performance to date =
Total done correctly this month + total done correctly in previous months samples
 Total sample this month + total sampled in previous months

Supervisor will circle the applicable performance from the formula above
 Outstanding - 99% or higher
 Proficient - 90% - 98%
 Unacceptable – 89% or lower

V. Closing of records and communication with HHSC

1. Records are closed when appropriate or remain open when customer is eligible	Sample size – <u>10</u> Number appropriately closed or appropriately left open- __
2. Communication with HHSC is appropriate and transmitted within the week information was received	Sample size – <u>5</u> Number with timely HHSC communication - ____

Total sample this month = 15
 Total this month done correctly = __

Total number sampled from previous months = __
 Total done correctly from previous months = __

Performance to date =
Total done accurately this month + total accurately done in previous months
 Sample this month (15) + Total number sampled from previous months

Supervisor will circle the applicable performance from the formula above
 Outstanding - 95% or higher
 Proficient - 85% - 94%
 Unacceptable – 84% or lower

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No tracker can be outstanding overall with any performance measured as unacceptable.

Some of the duties measured will not apply to every Program Tracking Specialist. In order to be rated “outstanding” overall, at least two assigned measures will be outstanding and the others proficient.

A Program Tracking Specialist will be rated “proficient” if she is not outstanding and does not have more than one measure rated unacceptable.

A Program Tracking Specialist will be rated “unacceptable” when two or more of the measures are unacceptable regardless of the ratings on the other measures.

Supervisor comments including note of whether hours are entered in a timely manner.

Tracker initials/date _____