Program Tracking Specialist Performance Measures

Information recommending reports for use in measuring tasks is intended to be helpful. Supervisors may use other methods if the information gathered is the same.

1. **Recruitment/Outreach should be performed weekly – Full Outreach Pool checked by the supervisor once a month**
* Pools are clear of mandatory outreach customers and any others required by management – TANF, FSE&T ABAWDs, FSE&T General Population, UI Profiled
	1. Prior to the week’s recruitment the supervisor will use TWIST Scheduler to print the pool of customers who are to be outreached that week. (mandatory TANF recipients, all FSE&T ABAWDs and others who management has designated to receive a recruitment letter). Records in TANF pool due to error or ineligibility must be corrected.
	2. After weekly recruitment has been completed the supervisor will print the TWIST event roster for Food Stamp and TANF Outreach
	3. Compare the two lists and check those not sent a recruitment letter to assure that they should not have received one (i.e. the customer is not in sanction status or exempt for some reason). If record required a correction, such as re-opening the previous case or forwarding for removal in the case of ineligibility, check to see that it was completed or initiated.
	4. The supervisor will print the UI profiling screen for the zip codes assigned to her office on the day after all outreach is to be complete. Those customers without a letter number have not been sent a recruitment letter
1. **All customers who are recruited/outreached have appropriate action within 8 days – open service, sanction, communication with HHSC to reconsider work code**
	* 1. Two weeks after checking outreach pools look at the TWIST event roster to determine if appropriate actions have been taken on the list of customers recruited earlier.
		2. An open record – Check the active list or customer service panel for those who have responded and should have an open TWIST record with orientation and a service code
		3. Penalized - Check the roster to see the action taken. If the action is not entered into the roster check the customer’s record.
		4. Communication with HHSC to reconsider – Can be seen on the roster as “good cause/cannot participate” or on the FSE&T history tab in TWIST.
		5. On the Tues. following the day the UI profiling screen was printed (number I.4. above) the supervisor prints the same list to assure that responses are marked

**Eligibility**

Customers receiving services from TANF or FSE&T funding sources are checked monthly for eligibility. Action is taken to stop payments from these funding sources and/or child care payments dependent on cooperation when appropriate. – This is measured as part of the sample requiring that records are closed when appropriate (see below - V. Closing of Records)

1. **Data Entry – Timeliness and Accuracy – Initial records should be accurately data entered within one day of receipt - Sample of 20 checked once a month**
* **Initial Record** **-** It is the responsibility of the supervisor to assure that no staff member in the office removes brochures from a location waiting for data entry for any reason. It is also the responsibility of the supervisor to assure that brochures signed by a customer are placed in the location waiting for data entry no later than 4PM of the day they are signed or immediately after the customer leaves the office when it is after 4PM.
* Timeliness-Records are opened in TWIST no later than one day after the day the customer signs the Brochure Employment Plan – TANF, FSE&T, RIO.
1. Supervisors – Check a sample of 20 brochure Employment Plans for each tracker. Note the date of the signature
2. Check WorkInTexas.com to determine the date the service was transferred from TWIST to WorkInTexas.com. It should be no later than the day after signature. Or/
3. In TWIST highlight the orientation service, click the print icon and select “Services Detail History- Selected”, OK – TWIST will show a printable detail of the current and historical actions taken by all staff with regard to the service. The earliest date listed under “Rev Date” (revision date) shows the date of the initial entry.

* Accuracy – all data elements are accurately included in the initial record including indication that orientation was received and the service that is the next step is data entered
1. Using the above sample or another random sample of 20 brochures – Do all records has the required elements including orientation and an open service?

Required elements if pertinent to the specific record

* + - * Name
			* Social security number
			* Initial appointment date (60 days out for TANF applicants)
			* TANF application date
			* Code for orientation
			* Code for other appropriate service
			* FSE&T referral
1. **Continuing Tracking**
* Timeliness - TANF applicants who are certified have records opened in TWIST/ Choices and services – including support services - opened in Choices within two days of certification. A random sample of 10 per month will be checked from the inactive list.
1. Supervisors will use the TANF Applicant Inactive Report. TANF applicants will soft close the day they are certified to receive TANF cash benefits. The services should be opened in Choices within two days of the date that the TANF applicant record appears on the inactive list. Check the number of days inactive for each record on the report. If the customers remain on the inactive list for more than two days, they will not be considered to have been opened in a timely manner. It may be necessary to review several days of inactive reports in order to get a sample of 10 customers.
* Timeliness - Hours are entered weekly as received - This will be monitored by the supervisor and noted in her monthly conversation with the employee. It will not be measured as part of this performance expectation. If a supervisor notes any pattern of few hours being entered for much of the month and many entered toward the end, she will have reason to assume that the Tracker is not keying the hours as soon as she receives them. The Tracker will initial a note on the review form indicating that she has been told this is not acceptable.
* Timeliness - Letters are sent for non cooperation by the third Monday of the month. A sample of 20 customers per PTS assigned to this duty will be checked once a month during the first week of the month for the previous month.
1. Use TANF LBB report.
	* + Filter to select customers in the all family denominator
		+ Filter out those who are in the numerator.
		+ Filter out those who have good cause.
		+ Print the report – Most of those left should have been penalized.
		+ Mark any customer from the list above if she does not require a letter warning of a penalty because of non-cooperation.
		+ Check the rest of the list (or 20 customers max for each tracker) against the roster (or individual record) to determine if the non- coop letter was printed.
* Timeliness - By the 8th day after a non-coop letter is mailed the appropriate action is taken – penalty, good cause or hours – Financial aid including child care is continued or stopped as appropriate. Use the sample of letters sent noted above.
1. Use the individual records of the sample above to determine if customers who were sent letters are coded for good cause, have been penalized, or show hours entered that would make either of the above unnecessary. Check for an end date of support service and a letter in the file showing a FAS was notified to stop child care. (When the Tracker is responsible for stopping child care by direct entry into the child care MIS, check to see that care was stopped.)
* Timeliness - The customer has been in job search for three consecutive weeks or 5 cumulative weeks and a letter must be sent asking her to talk to a PSR concerning her next step. Full sample of customers one week short of allowed job search at the time the TANF LBB is checked.
1. The supervisor will use the TANF LBB report to produce a list of all customers with either 3 consecutive or 5 cumulative weeks in job search. She will check the list against the roster or individual records to determine if the letters were sent.
2. **Closing of records and communication with HHSC – Timeliness & Accuracy**
* Records are closed by the Tracker when appropriate. A random sample of 5 to 10 records once a month will be checked to determine that services and Program details are closed in TWIST in the same month that the TANF cash payments are stopped by HHSC. The balance of the sample of 10 records will be checked to assure that TWIST records tracked under FSE&T are closed in the same month that Food Stamps are stopped by HHSC.
	+ Records are closed when HHSC determines that the customer is no longer eligible for TANF cash payments or Food Stamps. Customers who are being tracked in Choices may have services extended beyond the demonstrated cooperation month when the cooperation notice is pending at HHSC.
1. On or after the 9th of the month, use the Choices time report to note customers without a work code and pull a random sample of 5 to 10 customers. Check individual records (TANF history tab or SAVEER) to determine that these customers are in fact eligible for services. If the customer is not eligible the record has not been closed in a timely manner.
2. On or after the 9th of the month use the Food Stamp active list to pull a random sample to complete the balance of the required 10. Check the FSE&T History tab in TWIST to ensure that all customers remain eligible for services in the current month
* Communication with HHSC is appropriate and timely – A random sample of 5 customers a month.
	+ 2583 or 1817 to transmit information about changes in customer information – address phone etc. rescinding sanctions and reporting employment – Sample of 5 per month
1. The supervisor will print a random sample of 5 customers with a code 39 for unsubsidized employment in the Choices, FSE&T fund codes. Check TWIST and the customer physical files to determine if communication was sent to HHSC and recorded properly in TWIST.
* Electronic cooperation notice is sent to HHSC to restore customer benefits as soon as cooperation justifies restoration and is properly entered in TWIST.
	+ - 1. Supervisor will check TWIST to determine that the cooperation notice was physically *entered* in TWIST no later than five days after the last Friday of the program month if sufficient cooperation was received at that time (Penalties and Cooperation notices are processed overnight for TANF, and the **“TWC send date”** will reflect the actual data entry date of the notice or penalty).
			2. The “Initiate/Cooperate Date” (the date staff types into TWIST) must reflect a date that is no later than the last Friday of the program month for which the cooperation was completed, regardless of the actual data entry date.