Food Stamp On-the-Job Training Guide

Revised November 2005

FS OJT Guide – Table of Contents

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/ofi/ofi_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 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 on your caseload, 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 the counties 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 own caseload, but it does not give you everything you will need to know. In the long run, you and the families on your caseload will be better-served if you complete 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 county-specific information such as completion of worker logs, intake procedures, and local 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 your received no instruction during Phase I training. You will not complete all of these topics during OJT. Some, such as processing a hearing request, are best learned as the situation arises.

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 your county. Your supervisor will decide which of the non-mandatory tasks you will need to complete.

If you regularly encounter students in your county, 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 completing interviews, will take several days. Specific activities are not assigned to specific days because you will probably need to observe and conduct interviews as they become available. Schedule other tasks to be completed when you're not observing interviews.

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 or three days to OFIOJT@dhr.statega.us to report 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, and your notes about the interviews you observed and conducted. 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 on the trainee’s caseload 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:

- teaching the trainee about county-specific information such as completion of worker logs, intake procedures, and local resources

- teaching the trainee about areas not taught in FS Phase I training such as special assistance units, students and aliens, and

- reinforcing information the trainee has 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 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. Some, such as processing a hearing request, are best learned as the situation arises.

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 your county. You will decide which of the non-mandatory tasks the trainee needs to complete.

If your staff regularly encounter students in your county, the trainee will need to complete the internet training module entitle "Students." This module can be accessed at https://www.gadfcs.org/training/index.html.

Some assigned tasks will be quite simple and can be completed quickly. Other activities, such as observing and completing interviews, will take several days. Specific activities are not assigned to specific days because the trainee will probably need to observe and conduct interviews as they become available. Other tasks should be scheduled when the trainee is not observing or conducting interviews.

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. During OJT, the trainee will need to send to the remote instructor an email every two days to 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.state.ga.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, and notes about the interviews s/he observed and conducted. 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.

OJT TASK LIST

I. Orientation and County Procedures

A. Supervisor Conference

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 local needs and circumstances, notifying the remote instructor at the state office on the day the assignments are made.

5. The mentor will explain how to complete the worker log and any other routine reports completed by case managers.

B. Preparation of Work Space

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

2. The trainee will become familiar with the location and organization of forms, reference materials, etc. If needed, the trainee will gather forms and prepare "interview packets."

C. Case Record Organization

1. The trainee will read ESS Food Stamp Policy Manual Appendix D, "Case Record Organization" and

2. review several case records for organization.

D. Documentation

1. The trainee will review documentation requirements and ADTs using the information provided during FS Phase I training.

2. The trainee will read several records, noting how or if documentation standards have been met.

E. Caseload Management

1. With the designated mentor, the trainee will discuss how to manage the caseload, schedule appointments, report and record work, etc.

2. The trainee will develop a one-month plan for completing reviews and, if also assigned to "intake" to process new applications, will fit "intake" into the monthly schedule.

3. The trainee will review SUCCESS reports and SUCCESS alerts. The mentor will show the trainee how s/he uses the reports and processes alerts.

F. County Intake Procedures

With the help of the supervisor or mentor, the trainee will review county intake procedures, including procedures for expedited FS applications

G. Communication Procedures

With the help of the supervisor or mentor, the trainee will learn county procedures for communicating with CSE, Social Services, other OFI staff who work in child care and employment services.

H. Review of Local Resources

The trainee will review the county's resource handbook, learning about locally available resources that provide such things as food, help with paying rent or utility bills, etc. If a guide is not already available in the county, the trainee will develop one, with help from the OFI remote instructor, using the information on page 19, "Referral/ Resource List".

II. Additional Policy and Computer Training

A. Accessing and Using $TARS

With the help of the supervisor and/or mentor, the trainee will learn how to access and use the information on Child Support Enforcement's (CSE) $TARS system.

B. EBT Accounts

Using the desk guide provided during training, the trainee will review EBT procedures and observe the establishment of an EBT account by the mentor.

C. SUCCESS-generated Alerts

The trainee will review with the mentor how to manage and respond to the alerts generated by SUCCESS.

D. Policy

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

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.

   If the trainee's county regularly has students applying for or receiving food stamps, the trainee must complete the FS Online Training module on Students (access it at https://www.gadfcs.org/training/index.html).

If the trainee can be expected to regularly encounter situations involving any of the categories above, s/he should read the policy manual material related to these categories and review several case records that include individuals who fall into these categories. For example, if the trainee's county has significant numbers of seasonal farm or migrant workers, the trainee will need to study the policy manual section that addresses seasonal farm or migrant workers. Or, if the trainee's county has no homeless recipients, it would not be necessary for the trainee to study homeless AU policy as a part of OJT.

If, during any of the interviews the trainee observes or conducts, 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.

8. Voluntary quit

9. Jointly-owned resources

10. Self-employment

11. Medical deductions

12. Untimely reported changes

13. Processing changes when verification is not provided or is provided untimely

E. 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.

III. Interview Skills Development

A. Observe Interviews

The trainee will use the information on page 22 of this guide as an aid in knowing what to look for while observing interviews. During the observation, the trainee will probably see “combination” Food Stamp/Medicaid interviews.

The trainee will need to pay close attention to the Medicaid as well as the FS portion of the interview since s/he will be attending Medicaid training in a few weeks. The trainee will bring notes from observing interviews to Family Medicaid training, to be discussed during the first day of class.

B. Conduct Interviews

The trainee will Interview at least 2-3 clients with the mentor or supervisor present to observe the interviews, answer questions and provide feedback. The trainee will use page 23 of this guide with the mentor or supervisor to help review and process the information from the interviews.

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

1. If a woman applies for FS under this policy, what must be verified about the shelter in which she 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 that a battered woman owns jointly with the abuser?

4. What shelter expenses might a battered woman have?

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

6. In what county should the battered woman apply for FS?

Review several cases in which the AU lives in a battered women's 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. Ask your supervisor or assigned mentor about treatment centers you can expect to work with, and list them here:

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; this review is in case the AU asks about the FS allotment.)

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

Review several cases with AU members who live in drug or alcohol treatment facilities.

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 an ___________________ 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 an ______________ 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?

Review several cases with homeless AUs.

Policy Review
Seasonal Farm Workers
FS Policy Manual – Chapter 3235

1. Define migrant and seasonal farm worker.

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

3. Define “destitute”:

4. What is the SOP for a new application if the migrant or seasonal farm worker is determined to be destitute?

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?

Review several cases with AU members who are migrant or seasonal farm workers.

Policy Review
Strikers
FS Policy Manual – Chapter 3240

1. How is eligibility determined at application for an individual on strike?

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

3. List the individuals who are NOT regarded as strikers according to FS policy.

4. What POE is assigned to an AU that includes a striker?

Review any cases containing striking AU members.

Interview Skills Development
Observation of Interviews

Review the information from the “Casework Skills” portion of your new worker training. Observe at least 8 interviews during your first few days after training and make notes related to the questions listed below (make copies of this page to use as you observe interviews). Bring your notes to Family Medicaid training. The trainees will discuss their observations during the first day of class.

1. Did the interviewer begin the interview with an open question to invite the client to give an overall “picture” of their situation?

2. Did the interviewer use a variety of question types to gain information and “break up” the monotony of the interview?

3. What specific statements were made to help the client understand the purpose of the interview?

4. Was management discussed in detail? Assuming the AU’s bills are being paid, do you clearly understand how the client is managing to pay his/her bills?

5. How did the interviewer change from one topic to the next during the interview?

6. Was the clients’ situation questionable? What specific skills did the interviewer use to resolve questionable statements?

Interview Skills Development
Conducting Interviews

After observing at least 8 interviews, interview your first client with an experienced co-worker or your supervisor present. Prior to beginning the interview, review the case record and/or application and develop an overall mental picture of the client's situation.

Who lives in the home? What income and resources are reported? What bills does the client have to pay? If the AU is applying for FS, did something happen that caused the AU to decide it needed to apply for help now? Complete the interview, and then answer the same questions about your interview that we discussed in your observed interviews (make copies of this page). Bring your notes to Family Medicaid training; you will discuss your observations the first day of class.

1. Did you begin the interview with an open question to invite the client to give an overall "picture" of their situation?

2. Did you use a variety of question types to gain information and "break up" the monotony of the interview?

3. What specific statements were made to help the client understand the purpose of the interview?

4. Was management discussed in detail? Do you clearly understand how the client is managing to pay his/her bills?

5. How did you change from one topic to the next during the interview?

6. Was the client's situation questionable? What specific skills did you use to resolve questionable statements?

REFERRAL/RESOURCE LIST

If your county does not already have an up-to-date referral/resource list, develop such a list using the following guidelines.

- Any agencies that may assist the client in locating low-cost housing.
- Sources for low-cost food.
- Locations and directions for offices to which you may need to refer the client, such as the Social Security office or the Department of Labor
- Community Action for Improvement (CAFI) Center – its phone number, directions and the services the CAFI provides.
- Frequently used phone numbers, such as:
    - Social Security Administration
    - Department of Labor
    - Community centers
    - Food pantries
    - Churches that may help with individual needs
    - Senior citizen facilities
    - Police
    - Fire
    - Post Office
    - Local housing authority or Section 8

OJT TASK LOG

Orientation and County Procedures	**Date Completed**
Conference with supervisor	
Preparation of work space	
Case record organization	
Caseload management	
Intake procedures	
Communication procedures	
Review of local resources	
Additional policy and computer training	**Date Completed**
Accessing and using $TARS	
EBT accounts	
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.)

Interview skills development	**Date Completed**
Documentation	
Observe an interview	
Observe an interview	
Observe an interview	
Observe an interview	
Observe an interview	
Observe an interview	
Observe an interview	
Observe an interview	
Conduct an interview	
Conduct an interview	
Conduct an interview	

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