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EXECUTIVE COMMISSIONER

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To: Eligibility Services – Regional Directors
Program Managers
Eligibility Services Supervisors of
Business Process Redesign Offices
Regional Attorneys
Hearings Officers

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Subject: Business Process Redesign - Flexible Appointments

This bulletin is being sent to supervisors and other regional managers. Supervisors must share this information with Texas Works staff who is working in offices that have implemented Business Process Redesign (BPR). Please ensure copies are provided to staff that do not have access to e-mail. If you have any questions regarding the policy information in this bulletin, follow regional procedures. Active bulletins are posted on the Texas Works Handbook (TWH) website at <http://www.dads.state.tx.us/handbooks/TexasWorks/>.

Business Process Redesign – Flexible Appointments

Background

Business Process Redesign (BPR) is an effort launched by the Office of Social Services to improve the eligibility determination process across the state. The BPR process has been rolling out across the state since June 2014, introducing process improvements based on recommendations and feedback from field staff. One of these process improvements is the flexible appointment. The flexible appointment allows staff in BPR offices to contact the applicant by phone, without a scheduled appointment to initiate and conduct the interview. Flexible appointments also allow clients to contact HHSC for an immediate interview instead of attending a scheduled appointment.

Current Policy

When an individual submits an application, staff schedules the individual for an appointment using Form H1830, Application/Review/Expiration/Appointment Notice, unless the individual is interviewed the same day. Staff must provide Form H1830 to the individual the same day the individual submits the application or no later than the next business day if the individual submits the application by mail or in an office drop box. Staff schedules Interviews for a specific date and time.

If the individual misses the scheduled appointment, staff must document the missed appointment and send Form H1020-MA, Request for Information or Action-Missed Appointment, on the same day the individual misses the appointment.

New Policy

When an individual submits an application, BPR staff attempt to contact the individual by phone, without a scheduled appointment to initiate and conduct the interview. If staff are unable to reach the individual during the initial attempted phone call, staff will mail Form H1830-FA, Application/Review/Expiration/Appointment Notice-Flexible Appointment to the individual, which provides the applicant with the Flexible Appointment toll-free number. Form H1830-FA instructs the individual to call the Flexible Appointment toll-free number during business hours, from 8:30 a.m. to 4:30 p.m. when it is convenient for the individual to be interviewed. The call is routed to a BPR eligibility worker who conducts the interview.

Individuals are offered a Flexible Appointment for applications or redeterminations when:

- the program requires an interview; or
- the individual requests an interview.

The flexible appointment process is initiated either:

- by staff who will conduct the interview; or
- by the individual who calls the flexible appointment toll-free number.

Staff initiated interviews

Staff receive a task to make an outbound cold-call to the individual to attempt to conduct the interview. Staff must complete the cold-call attempt no later than seven calendar days after the file date.

- If the outbound cold-call and interview are successful, staff continue through Data Collection and either pend or dispose the Eligibility Determination Group (EDG), as applicable. Note: Staff must not pull the case into Data Collection until the individual has agreed to complete the interview.
- If the outbound cold-call is unsuccessful:
 - staff send Form H1830-FA the same day to notify the individual of the interview requirement and instructing the individual to call at a convenient time during business hours from 8:30 a.m. to 4:30 p.m.; and
 - process any programs which do not require an interview.

Form H1830-FA prints a date which is seven calendar days after the cold-call attempt. If the individual has not contacted HHSC by this date, the Texas Integrated Eligibility Redesign

System (TIERS) will automatically generate and send Form H1020-MA-FA, Request for Information or Action-Missed Appointment-Flexible Appointment for Supplemental Nutrition Assistance Program (SNAP). The H1020-MA-FA informs the individual of the final date their application will be denied or benefits terminated if the interview is not completed and provides the individual with the Flexible Appointment toll-free number to call to request an interview.

Note: The expedited application screening, processing, and eligibility determination timeframes for SNAP have not changed. Staff must continue to screen all applications for expedited services the same day they are submitted and process SNAP benefits no later than the next workday after the file date.

Client Initiated Interviews

When an individual calls the Flexible Appointment toll-free number to request an interview, staff will claim the task, conduct the interview, and complete Data Collection.

Flexible Appointment processes should be used whenever possible. However, Flexible Appointment processes do not eliminate face-to-face interviews. Staff must continue to schedule a face-to-face interview if the applicant requests one.

Rescheduled Interviews

With the implementation of Flexible Appointments, BPR offices will no longer reschedule appointments. Staff must inform applicants to call the Flexible Appointment toll-free number during business hours, from 8:30 a.m. to 4:30 p.m. when it is convenient for the individual to complete the interview.

Automation

A new “Flexible Appointment Office” indicator is added to **Manage Office Resources (MOR) Build Profile>Office page**. Only when this indicator is updated will Flexible Appointment processing be functional in TIERS. Staff must confirm that they are in a Flexible Appointment Office before attempting to initiate the Flexible Appointment process.

In **Register Application-Summary**, staff must answer the new questions:

- “Is an appointment required or requested to process this application?” If “yes”, then answer the next question;
- “Are you conducting a flexible appointment interview now?”
 - Note: Only answer “yes” to this question if proceeding with the interview.

Staff make a selection in the **Program List** section to identify either Appointment Tasks or Process Tasks. Only one selection is allowed for each program.

- Appointment Tasks - used to create “scheduled interview” tasks for selected programs.
- Process Task - used to complete non-interview for selected programs.

In the **Appointment-Details** page, the new question, “Are you conducting a flexible appointment now?” appears. Staff selects the Contact Type for a client initiated or outbound cold call and can create a task if the application is submitted at the local office.

New tasks created for Flexible Appointments are:

- “Process an Application Flexible Appointment” task; and

- “Process a Redetermination Flexible Appointment” task.

These tasks are only created when there are programs that require an interview or the client requested an interview.

For interviews that are not completed by the Form H1830-FA due date the Task List Manager (TLM) will automatically update the task from “check in” to “no show” and trigger TIERS Correspondence to send the Form H1020-MA-FA. Staff must continue to manually deny Temporary Assistance for Needy Families (TANF) or Parent/Caretaker Medicaid EDGs for interviews not completed by the H1830-FA due date. There is no change to the automated denial process for SNAP EDGs.

Automation to support the flexible appointment process is available beginning October 1, 2015.

Effective Date

Changes described in this bulletin are effective for any new application received in a BPR office on or after October 1, 2015.

Handbook

Staff will be informed when the Texas Works Handbook is updated.

Training

The training is available on the Program Area Learning Management System (PALMS) at: <http://palms.hpsc.state.tx.us>.

From the PALMS Home page, staff may navigate to **Courses> My Courses> Featured> Business Process Redesign (BPR)** and then choose **Flexible Appointments** to take the required course. Estimated completion time for the course is 60 minutes.

Staff must take the Flexible Appointments training and achieve an acceptable score by no later than September 18, 2015. A live webinar with additional training and instructions will follow later in September 2015.