Pre-training Activities
for New Eligibility Specialists/CRAIIIs

Office for Family Independence
Maine Department of Health and Human Services

Prepared by the Muskie School of Public Service
University of Southern Maine
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Welcome

Welcome to the Office for Family Independence (OFI), formerly called the Office of Integrated Access and Support (OIAS). You’ve joined a dedicated group of staff devoted to assisting Maine’s low-income families by providing temporary benefits that help them meet basic needs. We are committed to providing services to help people become self-supporting; at the same time, we work hard to improve the quality of and access to our services.

Eligibility Specialists/CRAIIs are the frontline staff representing the Maine Department of Health and Human Services to Maine’s low-income families. It is a challenging, important, and rewarding job. People apply for assistance for a wide variety of reasons. Because people find it difficult to ask for help, particularly help from the State, some wait until they are quite desperate. As a result, people may be in crisis when they meet you for the first time. It is important to remember that you’re not just gathering facts to enter on a computer; you are providing services to people facing significant needs.

During your first few months of work, your primary responsibility is learning program policy and procedures, including use of the Automated Client Eligibility System (ACES). We’ve adopted a standard approach to basic policy training to make sure that all new Eligibility Specialists/CRAIIs receive consistent initial training. The training has two components: a central portion with classroom training and a Learning-at-Work segment, which happens in your local office. Both components are vital in helping you to learn program policy and how to use ACES. The trainers will share information with your Supervisor about how well you do in the central portion of training and suggest areas where you may need additional work. Your Supervisor has the primary role in guiding you through Learning-at-Work activities, helping you learn to apply policy and the Bureau’s philosophy on the job, and giving you feedback on your work.

In addition to learning what program policy says, it is important that you understand why the rules exist so that you can clearly explain these rules to clients. Although ACES is a tool that can help you in your job, it cannot explain program requirements or eligibility decisions to applicants and program participants; that is your responsibility.

Academic credit:
New Eligibility Specialists/CRAIIs can receive academic credit for successfully completing the Standard Eligibility Training Program through a portfolio process. Specific information is included in this guide; you will also learn more about it during your first week of classroom training. You must complete all parts of the training program regardless of your decision to seek academic credit. It is important to know that deciding whether to seek academic credit will not affect your employment as an Eligibility Specialist/CRAII. Your pay level and your success as a Specialist/CRAII are not dependent on seeking or receiving academic credit. Education is one of the factors that may be considered when evaluating employees for possible promotion in the future.

Again, welcome to OIAS.

Barbara J. Van Burgel
Director

Maine Department of Health and Human Services
Office for Family Independence
Pre-Training Activities
Overview of Learning-at-Work for Supervisors

Supervisors are responsible for overseeing the Learning-at-Work component of the training and for assuring that all of the activities are completed. The guides and activities in the Learning-at-Work manuals are designed to assure that all new Eligibility Specialists/CRAIIIs participate in the same core training activities. Supervisors will want to add supplementary activities to help the new employee become proficient in using the ACES system, learn more advanced policy application, learn about local office procedures, and increase their comfort and skill level in conducting interactive interviews.

With this approach to orientation and training, the Supervisor functions as a coach. Supervisors will arrange learning opportunities, monitor the Eligibility Specialist's/CRAII's participation in them, and provide positive and constructive feedback as Eligibility Specialists/CRAIIIs learn to apply program policy to actual cases. Many supervisors find it helpful to schedule regular meetings with their trainees during Learning-at-Work weeks.

A note about ACES training for new employees:
Policy and ACES training are integrated throughout the training cycle to the extent possible. All central ACES training is done on the ACES training database. Trainees will work on a variety of case examples during the classroom training; when they are back in their local offices for Learning-at-Work weeks, they may have ACES-based homework assignments to reinforce ACES procedures covered during central training.

As trainees gradually gain proficiency in ACES, many supervisors also like to assign them to work on actual cases during Learning-at-Work weeks. This can be an important part of helping new employees learn to apply what they have studied on the job, provided that actual casework assigned corresponds to both the policy and ACES studied in the classroom.
Overview of Learning-at-Work for Trainees

Although Supervisors are responsible for overseeing the Learning-at-Work component of the training, new employees are expected to take the initiative in completing this portion of training. The guides and activities in this manual are designed to assure that all new Eligibility Specialists/CRAIIs participate in the same core training activities. Your supervisor will want to add supplementary activities to help you learn more advanced policy application, become comfortable using the ACES system, and increase your comfort and skill level in conducting interactive interviews.

Your Supervisor will provide support, guidance, and answers to your questions during your Learning-at-Work and beyond. He or she may also ask other experienced staff to assist in the process. Ultimately, though, you are responsible for your own learning and you will be able to become more independent as you progress through the training.

As a new Eligibility Specialist/CRAII:

1. **Take the initiative to meet with your Supervisor regularly and let him/her know how your training is going.**

2. **Complete all the learning guides and worksheets contained in this guide.** As you complete the Learning-at-Work guides, share them with your supervisor. If you want to receive academic credit for completing the Learning-at-Work portion of your training, (more information about this option can be found in this guide), many of the Learning-at-Work Guides must be completed, reviewed and signed by your Supervisor, and included in the portfolio you submit for review.

3. **Ask questions** whenever you are unclear about a policy or procedure, or when you feel confused or lost. Be sure to use your meeting time with your Supervisor wisely and ask questions of your coworkers.

4. **Develop the habit of looking things up in the policy manual(s) before you ask a co-worker or your Supervisor for clarification.** This will help you to understand their answers and increase your proficiency at finding information in the policy manuals.

5. **Expect that being an Eligibility Specialist/CRAII will require continuous learning** as new laws take effect, policies change, and programs evolve.
Activities to Complete Before Standard Eligibility Policy Training

In order to get the most out of the Standard Eligibility Policy Training Program, new Eligibility Specialists/CRAIIIs should have the opportunity to meet their co-workers, get settled in their work area, and begin to orient to their workplace prior to beginning the classroom portion of this program. We realize that new employees will have varying amounts of time on the job before they start standard training. If possible, all new employees should do the following activities before starting the central portion of standard policy training. Check off each item as you complete it.

☐ **Passwords:** The new Specialist/CRAII needs to have an ACES password assigned, obtain passwords to other records and systems, and learn how to complete the electronic timesheet.

☐ **Supervisor reviews the Confidentiality Policy (and enhanced confidentiality provisions associated with ACES) with the new Specialist/CRAII. New Specialist/CRAII reads and signs as required.**

  **Purpose:** Even though Confidentiality training is included in the Standard Eligibility Policy Training, new employees must get this information on the first day of employment.

☐ **Supervisor explains the Department’s expectations around customer service.**

  **Purpose:** While appropriate treatment of clients will be emphasized throughout the Standard Eligibility Policy Training, it is important that this expectation begins with the Supervisor.

☐ **If time permits, new employee observes a TANF Orientation session.**

  **Purpose:** TANF Orientation is the first introduction to OFI for many clients. It is important for all new Specialists/CRAIIIs to hear the same message the clients hear.

☐ **New employee completes a standard Application (BFI APP 01) for his/her own family.**

  **Purpose:**
  a) Develop an appreciation for the very personal nature of the information applicants are asked to disclose during the application process, whether on paper or during an interactive interview.
  b) Recognize that applicants may not know information needed for some parts of the application form without checking documentation at home.
  c) Read every question on the application carefully.

(This form will **not** be turned in to the Supervisor or trainers).
☐ Supervisor selects several case records for the new Specialist/CRAII to read.

Purpose: It will be easier to understand much of the material covered during training if the new Specialist/CRAII has seen a case record. Trainees become aware that while ACES is the official record, some important paper documents are also kept in client files.

☐ Supervisor or designee assists new Specialist/CRAII in gathering the information listed on the Checklist of Materials to Bring to Standard Eligibility Policy Training provided in this guide.

☐ Supervisor or designee meets with the new employee to discuss the service area covered by the office, review characteristics of people served, and provide overview of local social service agencies and the services they provide. Review the local resource list if one is available so the employee can complete the Community Service Agencies Worksheet provided in this guide.

☐ Supervisor arranges for the new Specialist/CRAII to spend some time observing in the waiting room and complete the Waiting Room/Lobby Observation Worksheet.

☐ Supervisor arranges for the new Specialist/CRAII to observe an Interactive Interview. Remind trainees to make notes about any questions they have about the interview to discuss when it is completed (rather than interrupting the interview).

☐ Supervisor arranges for the new Specialist/CRAII to spend some time with the person providing phone coverage in order to develop a sense of the most common types of calls and questions.
Checklist of Materials to Bring to Standard Eligibility Policy Training

☐ Policy Manual* (for the appropriate program)

☐ Standard Application BFI APP 01 (completed by new employee)

☐ Lined paper for note taking

☐ Battery operated calculator (we have some calculators available in the training room, but many people prefer to use their own.)

*Note: New employees will need access to the policy manuals for all three programs during the first week of training. They do not need to carry the manuals to class every day; in fact, storage space will be a problem if they do! But they will be expected to do some reading in each manual as homework during the first week.
Characteristics of Area and People Served

You’ll need to talk with your supervisor or a coworker designated by your supervisor to complete this worksheet.

Name: _________________________________________________ Date: _________________

1. Describe the geographic area that your office serves and what portion of it you’ll work in (counties, portions of counties, urban/rural, itinerant sites, etc.).
   ____________________________________________________________________________
   ____________________________________________________________________________
   ____________________________________________________________________________

2. If a person who lives in another part of the state comes to your office to apply for benefits, how should you handle it? _____________________________________________

3. Describe the population served by your office, noting any populations with particular needs.
   ____________________________________________________________________________
   ____________________________________________________________________________
   ____________________________________________________________________________

4. Where is the DSER office for your area located? ___________________________________

5. What other Offices of DHHS are located in your building? _____________________
   ____________________________________________________________________________

6. What types of employers are in the area? Describe the types of work opportunities available. Note whether the area offers many of seasonal jobs. Describe local trends in employment (e.g., have local mills closed, new types of employers moved in, etc.).
   ____________________________________________________________________________
   ____________________________________________________________________________

7. What types of educational institutions are available in the area? How do they affect the type of clients you will see in your office?
   ____________________________________________________________________________
   ____________________________________________________________________________
   ____________________________________________________________________________

Supervisor’s Comments: __________________________________________________________
   ____________________________________________________________________________
   ____________________________________________________________________________
   ____________________________________________________________________________
Community Service Agencies

During your work as an Eligibility Specialist/CRAII, you will refer clients to a wide variety of service agencies such as those listed below. Find out if your office has a resource list to give to clients. Find out what types of services each agency provides. Talk to your Supervisor and co-workers to see what information is available.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Local Resource/Phone #</th>
<th>Services Provided</th>
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<tbody>
<tr>
<td>Adult Protective</td>
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<tr>
<td>Career Centers</td>
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<tr>
<td>Child Protective</td>
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<td>Clinics</td>
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<tr>
<td>Clothing</td>
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<tr>
<td>Community Action Program (CAP Agency)</td>
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<tr>
<td>Crisis Hot Line</td>
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<td>Domestic Violence</td>
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<td>Energy Assistance (HEAP)</td>
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<tr>
<td>Food Pantry</td>
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<tr>
<td>General Assistance (GA)</td>
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<tr>
<td>Housing</td>
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<tr>
<td>Job Training</td>
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<td>Literacy</td>
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<tr>
<td>Social Security (SSA)</td>
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<tr>
<td>Substance Abuse Treatment</td>
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<tr>
<td>Temporary/ Emergency Shelter</td>
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<tr>
<td>Transportation</td>
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<tr>
<td>Unemployment Office</td>
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<tr>
<td>Other</td>
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**Waiting Room /Lobby Observation Worksheet**

Name: _____________________________________________ Date: ___________________

1. What are the three most important functions of the receptionist? Consider these functions from the perspectives of both the applicant and the Eligibility Specialist/CRAII.
   a. __________________________________________________________________________
   b. __________________________________________________________________________
   c. __________________________________________________________________________

2. Describe what you saw during your observation period.
   ______________________________________________________________________________
   ______________________________________________________________________________
   ______________________________________________________________________________

3. How were people treated while they were in the Waiting Room? Observe how they were greeted.
   ______________________________________________________________________________
   ______________________________________________________________________________
   ______________________________________________________________________________

4. Find out how you know which Interview Room to use.
   ______________________________________________________________________________
   ______________________________________________________________________________
   ______________________________________________________________________________

5. How does the Receptionist keep track of who is in which Interview Room?
   ______________________________________________________________________________
   ______________________________________________________________________________
   ______________________________________________________________________________

   Supervisor’s Comments: ____________________________________________________________
   ______________________________________________________________________________
   ______________________________________________________________________________
   ______________________________________________________________________________
Through an agreement between the Muskie School and the University of Maine at Augusta (UMA), new employees may receive up to 7 hours of academic credit for the Standard Eligibility Policy Training. You will learn much more about this opportunity during the classroom training. However, there are a few things you should know about the process before you start the training.

Receipt of credit is not automatic just because you complete the training. New employees must submit a portfolio documenting their training and their learning in several core competency areas. When the portfolios are complete, employees submit them for review by the designated training instructor(s). You will receive a specific list of information that goes into the portfolio during the training.

Whether you are pursuing credit or not, you are responsible for completing all the learning activities included in the Learning-at-Work Guides.

Your decision about whether to seek academic credit does not affect your employment as an Eligibility Specialist/CRAII. Neither your pay level nor your success as an Eligibility Specialist/CRAII is dependent on your receiving academic credit. When you apply for promotions in the future, however, your education may be one of the factors considered.

The cost for having a portfolio approved is $35 per credit hour. The classroom portion of the training is comparable to HUS 101 (Introduction to Social Services), a 3-credit course. The Learning-at-Work portion of your training is comparable to HUS 210, Career Exploration in Social and Rehabilitative Services, a 4-credit course. You may request tuition assistance from UMA or reimbursement through the Department's Tuition Reimbursement Program. The fee covers UMA’s costs for creating and maintaining your academic records. None of the fee goes to the Muskie School or its staff.

Although no strict time requirements are enforced, we recommend that you make a decision about pursuing academic credit, and complete your portfolios, by the end of your 6th month of employment.

The credits awarded through UMA will count toward either a Certificate in Human Services, an Associates Degree, or a Bachelors Degree in Human Services.