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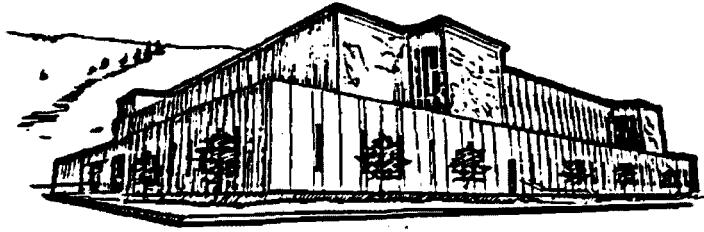
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University of
Montana

COMPUTERIZING THE DEPARTMENT OF SOCIAL
AND REHABILITATION SERVICES:
AN ASSESSMENT OF THE ECONOMIC ASSISTANCE
MANAGEMENT SYSTEM TRAINING PLAN

by

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B. A., University of Hawaii--Manoa, 1979

Presented in partial fulfillment of the requirements
for the degree of
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Approved by


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Special thanks to Carole Graham for allowing me the opportunity to participate in the TEAMS project and for assisting those who wish to pursue a higher education.

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CHAPTER I
INTRODUCTION

"...remember to breathe deeply, remain flexible and go with the flow..."¹

The State of Montana's welfare programs have moved out of the paper shuffle of the past and into the computer age with the implementation of computerized welfare services. The system is called The Economic Assistance Management System (TEAMS).

The development and implementation of TEAMS was a significant event in the history of SRS and the change has greatly impacted the way in which staff perform their duties, along with how they perceive the concept of a "case file." The paper file is gradually being replaced by a computer file of information, and the worker's conception of what is allowable verification is also changing.¹ Staff

¹Judy Garrity, Montana SRS TEAMS Newsletter, Department of Social and Rehabilitation Services, September 1989.

²It was discussed during training that workers would no longer be required to have "hard copy" verification of some items in the paper case file. An example of hard copy verification is a photocopy of pay stubs, verifying a client's monthly wages. Wage stubs are submitted as required, photocopied, and placed in the paper case file. In the future, it will be acceptable to record on the computer "visual verification," and not make a photocopy of the wage stubs. This streamlining of procedures makes some
(continued...)

still rely upon their old methods of recording client information and will probably continue to do so until they have learned to trust the computer.

Given the radical departure between the old method of caseload maintenance and the new computerized method, I became interested in how this change was going to affect staff and how staff would adjust to this type of change. Could a training program successfully deliver a training approach to an audience which has minimal computer skills? That interest and concern is why I chose to examine the effectiveness of the TEAMS training for Mineral, Missoula, and Ravalli counties.

The concept of computerized eligibility welfare services in Montana emerged when Social and Rehabilitation Services (SRS) received information about enhanced funding available from the federal government. It is expected that the federal government will pay 85 percent of the two-year development phase at \$6.5 million, and underwrite 66 percent of the first three years of the private operating cost at \$8.5 million.¹

SRS began formulating an acceptable plan for the design and implementation of a state wide eligibility

¹(...continued)
workers uneasy, since there will no longer be a hard copy to refer to.

³Montana SRS TEAMS Newsletter, Department of Social and Rehabilitation Services, February 1990.

management system in the mid-1980's. SRS undertook this computerization in hopes that TEAMS would accelerate the eligibility determination process for welfare programs, including Aid to Families with Dependent Children (AF), Food Stamps (FS), and Medicaid (MA).⁴ Goals included the reduction of fraud and of manual processing of paperwork, and an increase in the efficiency of eligibility examiners. This was expected to boost staff morale and enhance communication between Helena officials and the field offices, since the project links all 56 county offices with the state's mainframe computer in Helena.

Montana officials selected BDM International Inc., of Albuquerque, New Mexico, as the primary contractor and Andersen Consulting as the major subcontractor on the project.⁵ To insure that the system would be ready for general use throughout the state, two counties were selected as pilot sites. The counties selected were Lewis and Clark and Jefferson Counties. The following criteria and conditions were established for selecting the two pilot counties:

⁴All assistance programs and medicaid subtypes are two letter codes.

⁵The project was completed in two phases: Systemhouse, Inc. was contracted to complete phase one which included the selection of a donor system, development of a requirements analysis, and external design; BDM and Andersen Consulting were contracted to complete phase two which consisted of the refinement of the external design, program testing, and implementation of the system.

1. one state administered and one state supervised county;⁶
2. one large caseload and one small caseload county;
3. two counties that are geographically close to the project site;
4. strong support of county staff; and
5. relative experience level of county staff.

Project staff members worked on site in the two pilot counties to provide support, to monitor performance of the system, and to respond quickly to problems. The two pilot counties converted to TEAMS approximately three months prior to the system being implemented statewide. The conversion schedule began August 1, 1991, and continued for four months with Mineral, Missoula, and Ravalli Counties converting October 1.

PROBLEM STATEMENT AND METHODOLOGY

Problem Statement

SRS personnel were enthusiastic about TEAMS. The new system was expected to make the eligibility examiner's job of processing new applications easier, and the task of monthly caseload maintenance faster. Marilyn Carlin, TEAMS Project Director, states, "Most people who are outside the [TEAMS] process do not realize the extent to which the

⁶State administered counties are controlled by the state; in state supervised counties, the county commissioners establish office policy.

eligibility process is going to be automated."⁷

This unknown process was the source of some concern for staff at the Missoula County Office of Human Services (OHS). There was concern whether the training would actually provide the staff with the knowledge, skills, or other competencies as outlined in the training objectives.

Eligibility examiners who have worked for SRS for a longer period of time (more than five years) were more skeptical than new staff who were only recently hired--some of whom have previous computer experience. As one eligibility examiner with 11 years of experience stated, "If past training efforts are an indicator of future training, TEAMS will probably be dumped on us with little or no training on what it is we are suppose to be doing."⁸

The concern for adequate training did not go unnoticed by SRS nor BDM and was listed as one of three concerns that would be addressed during training or in the months preceding training to guarantee a smooth introduction into TEAMS. The concerns were:

generalized computer anxiety many personnel lack experience with computers and fear that learning how to

⁷Montana SRS TEAMS Newsletter, Department of Social and Rehabilitation Services, September 1989.

⁸When I started gathering ideas for this paper, I informally asked co-workers and management (in September 1990) what their concerns were regarding TEAMS. I asked this particular co-worker for her comments, because of the number of years of service she has with OHS. However, she requested that her name not be revealed, because of the negative tone of the comment.

use computers might be difficult;

interacting with the computer most personnel lack understanding of how they will interact with the computer, what is expected of them and what they can expect from the computer; and

lack of involvement in changes SRS personnel indicated that a cause of problems in past changes was a lack of involvement, awareness and communication of the change.⁹

Methodology

Academic, Louise G. White states, "It is important to be aware of the view we are taking and the extent to which it influences the data we look for and find."¹⁰ I am currently employed as an eligibility examiner for SRS at the Missoula County OHS. At the Montana Public Welfare Association (MPWA) convention in Missoula, October 1990, a request was made for volunteers to assist in the testing of TEAMS. From January through April 1991, I assisted in the development of test case scenarios and was an active participant during the technical and functional testing of the entire TEAMS system prior to implementation. As a designated "super user"¹¹ for TEAMS, I also assisted with

⁹BDM and Andersen Consulting, "The Economic Assistance Management System, Training Plan," p. 7, Department of Social and Rehabilitation Services, September 1990.

¹⁰Louise G. White, Political Analysis: Technique and Practice, (Brooks/Cole Publishing Company, Pacific Grove, 1990), p. 82.

¹¹A super user is a person who receives TEAMS training before his/her home county. By participating in the training beforehand, this person will help the participants
(continued...)

training in Billings and in Missoula.

The experience to integrate my work activities with this paper presented what White refers to as "exploratory research"--to immerse one's self in a topic for the purpose of collecting data about a situation.¹² She states this intense data collection is appropriate when we know little about a situation, and when we want to spread as wide a net as possible, sweeping in not only the particular elements that initially seem interesting, but the seemingly irrelevant or trivial.¹³

I was not sure where to begin my search for information. Yet from the moment I learned about the TEAMS project, I made every effort to participate as much as my position would allow. Participating in the technical and functional testing of the system provided very useful background information and insight into what lay ahead.

I was curious about the impact TEAMS would have upon staff and forever changing the way in which information would be processed. TEAMS was a historical event in the life of SRS, and the impact this change would have was

¹¹(...continued)
to better understand how TEAMS works, and will be a resource person for answering questions during and after conversion.

¹²White, p. 42.

¹³Guerrillas in the Bureaucracy, pp. 6-7, cited by Louise G. White, Political Analysis: Technique and Practice, (Brooks/Cole Publishing Company, Pacific Grove, 1990), p.43.

surely to be significant.

Framework for Evaluation

Selecting a framework for evaluating a program in the human services is an important first step in approaching the assessment of training. I will review the first four of five components suggested by Austin, Brannon, and Pecora as part of this evaluation process. These components are:

1. preliminary factors that affect the training program, such as the capacities of the trainees and the agency's service mandates;
2. the training program itself, with its objectives, content, instructional methods, instructor;
3. trainee performance while in training;
4. trainee performance after the program; and
5. the clients who receive services from trained staff.¹⁴

Each of the four components will be discussed in greater detail in the next chapter.

Evaluation by Staff

Upon completing the five days of TEAMS training in September, I asked each participant to complete a questionnaire (Appendix 1). I explained to the participants

¹⁴Michael J. Austin, Dianne Brannon, and Peter J. Pecora, Managing Staff Development Programs in Human Service Agencies, (Nelson-Hall Publishers, Chicago, 1984), p. 151. Only the first four of these five components will be discussed for this assessment. Attempting to evaluate the services the clients receive from newly trained staff would exceed the limits of this paper.

that a second questionnaire would be mailed to them after conversion or in approximately three months.¹⁵

On January 28, I distributed the second questionnaire to the same participants,¹⁶ asking them to evaluate the training they received in September (Appendix 2). There was a cover letter attached to each questionnaire with some brief instructions, and a message that the results would be shared with BDM and SRS.

This paper will examine and review the implementation of the initial TEAMS training program for Missoula, Mineral, and Ravalli Counties with regards to the participant's ability to perform their job duties; incorporate participant responses from the questionnaire to make suggestions; and because of the opportunity I have to work on a daily basis with a majority of the participants, I will make recommendations from personal observation.

¹⁵Conversion (or "rolling out" as it was also called) was the first two-months each region was allowed for inputting the county caseload into the computer. I wanted there to be adequate time to allow for actual learning and some familiarity with the system to develop, before I mailed the second questionnaire.

¹⁶There were a total of 45 participants in the September training session, one of whom was a central office staff person. Since September, two people have terminated employment with SRS and another from Missoula county retired. Thus, there were a total of 41 questionnaires distributed in February (compared to 45 distributed in September), and 40 were returned.

CHAPTER II

TRAINING EVALUATION COMPONENTS

Preliminary Factors Affecting Training

Early in the preliminary planning for TEAMS, county directors were contacted and asked to identify particular computer related skills of their staff. For example, they were asked to determine how many of their staff could type, and how many were already familiar with using a computer.

The training audience for TEAMS was comprised of workers with a wide variety of backgrounds--including education, age, and work experience--since job responsibilities from one county office to another vary greatly. This made it difficult to develop a common user profile.¹ Yet, one common characteristic was very apparent: most staff have "little or no computer experience."² Those with computer experience tend to be

¹BDM and Andersen Consulting, "The Economic Assistance Management System, Training Plan," p. 6, Department of Social and Rehabilitation Services, September 1990. In a large county like Missoula that employs approximately 37 staff, there is greater specialization in job responsibilities. However, in a small county such as Broadwater which has no supervisors, the county director performs many of the supervisory functions of reviewing a worker's cases for accuracy.

²Ibid.

the clerical staff who have word processing skills, and only some eligibility examiners are familiar with using the General Relief Assistance system.³

The training had to interfere with SRS county business as little as possible. Two, five day, training sessions were held at Missoula. The participants were paired into teams, and half the office staff were trained in different weeks. This allowed one team of workers to cover for another while they participated in the training.

The Training Program

To insure the successful implementation of TEAMS, it was important that the training accomplished specific objectives. These were:

1. to develop an overall understanding of the new TEAMS system;
2. to gain hands-on experience on the use of TEAMS functions and how TEAMS would be used to perform their daily job duties; and
3. to become proficient with the use of available reference sources.⁴

The TEAMS training focused on the conversion process and the type of cases and circumstances which were most

³General Relief Assistance (GRA) is a state funded program. During the initial planning for TEAMS, the state had the option to pay the additional cost of integrating the GRA system with TEAMS. However, the state chose not to do this, and there is a separate GRA system.

⁴Ibid., p. 1.

likely to occur.⁵ During the five day training schedule, workers participated in exercises designed to train them on specific TEAMS functions necessary to their job duties. Special circumstances were discussed briefly, but the training clearly emphasized the job duties of the eligibility examiner and of the clerical staff for application registration, inquiry, maintenance, and benefit authorization, etc.

Most of the TEAMS training was instructor-led. Because the SRS training audience had minimal computer skills, BDM's experience suggested that this method was the most successful.⁶ Also, current SRS training is more "human intensive" rather than technology intensive, and to implement a new and more complicated approach at this time was thought to be risky.⁷

Approximately 30 percent of the class time was lecture, and 70 percent was on-line practice with exercises. The exercises were designed to mirror actual job performance in such areas as already mentioned above.

⁵Each county had two-months to convert their county's entire caseload. A specific format was recommended by TEAMS staff which prioritized cases to be converted and those which could wait. Any cases with wages that varied from month-to-month had the highest priority and AF cases with no change in benefit amount had the lowest. If a case had not been converted, TEAMS would automatically issue the same benefits for the second month that were issued previously.

⁶BDM and Andersen Consulting, p.11.

⁷Ibid.

BDM and Andersen identified specific skills that each TEAMS instructor should have:

- ability to communicate effectively;
- active listening skills;
- familiarity with SRS programs;
- ability to project a positive attitude; and
- ability to be flexible and work under various working conditions.⁸

The personality of each instructor was an important factor which cannot be ignored. Numerous favorable comments were cited on the questionnaires concerning the lead instructor. Joan Foss, the lead instructor, clearly had a positive effect on the success of the training.⁹ Her easy-going manner, plain talk and folksy humor, lightened everyone's attitude throughout the training session. She clearly demonstrated her understanding of the system which helped those around her feel comfortable with the new technology. Her rapport with the group generated harmonious agreement even with those who had been skeptical of the new system and resisted the change.¹⁰

⁸BDM and Andersen Consulting, p. 4.

⁹Ms. Foss was an eligibility examiner in Blaine County for nearly eight years, before she was hired as user support for the TEAMS project. She worked very closely with Mike Russell from Anderson Consulting to develop the training program.

¹⁰While in Billings, participating in the region 1 training, a county director commented on how much better suited he thought Ms. Foss' personality was to Montanans. I sense there may have been some resentment by some Montanans that BDM was bringing in so many "outsiders" from around the country.

Trainee Experience/Performance While in Training

The TEAMS training was not used to train workers on policy or eligibility issues. The training was specifically designed to enable workers to use the new TEAMS system to effectively perform their daily job duties; to be able to log on and off of TEAMS; to be comfortable with resource materials and equipment; to become familiar with menus and screens; and to be able to navigate through the system.¹¹

A "buddy system" was used which paired two workers per terminal during the training. The county director determined in advance which people might best work together. If, however, a pair had problems working with each other or the pair was extremely fast or slow to complete the exercises, the participants were separated and paired with another to ensure that all participants received the maximum benefit of the training.

One worker would read the exercise directions as the other worker performed the exercise. When the worker finished the exercise, they would reverse roles so each worker would have the opportunity to practice the exercise. However, there were many instances, due to of lack of time, when only one worker would perform an exercise in a training module.

Some of the participants noted on the questionnaire

¹¹"TEAMS Training Participant Guide," Section I, pg. IT-1.

that they needed more time to practice and that it was a lot to learn in only five days. Lack of time and a feeling that they were being rushed through a training module was a source of frustration for some of the participants, and many of the open-ended comments reflected this. Despite this, many participants stated that a hands-on approach, step-by-step exercise instructions, and watching someone else work the exercises were all helpful learning techniques.

Trainee Performance After the Program

There was approximately a two-week waiting period after the training, before staff could begin converting cases. During this time, it was a tedious duty for staff to process benefits as they had done in the past. Everyone was anxious for October 1 to arrive--this was the first day Mineral, Missoula, and Ravalli counties could begin converting cases.

I cannot remember when I have felt so much excitement in the Missoula office. Management placed conference calls to other counties who had "survived" conversion to inquire on what procedures they found most useful.¹² I was asked

¹²Now as I look back on this in retrospect, some of the questions and concerns almost seem humorous. As a super-user, I had the impression that conversion could be extremely hectic, and that workers would encounter confusing and unfamiliar situations that training could not prepare them for. However, as the third region to convert, we had the benefit of not having to experience certain problems, because they had already been corrected before our region converted. Harvey Chute, TEAMS Program Manager for BDM, was in Missoula for a few days as part of the conversion support staff. He commented that he thought he was going to be "run
(continued...)

by management to produce a "Procedures for Converting Your First Cases" guide to distribute to staff (Appendix 3). This was a very elementary, step-by-step, "refresher course" in preliminary conversion procedures.

For the two-month conversion period, my duties as the super-user were to be available to staff and management and assist them with TEAMS questions. There were numerous situations, which occurred while workers were converting their caseloads, that training could not address. Staff worked very diligently and were successful at accomplishing the task of converting all their cases before the deadline.

One observation during conversion was that most staff did not adequately utilize the various user help guides which were available to everyone, e.g., the TEAMS Handbook, Job Aids, and the F1 help screen which explains the screen that is currently displayed.¹³ This is probably because there was not enough emphasis during the training exercises to reinforce the use of the help guides.¹⁴

¹²(...continued)
ragged" with questions in Missoula, because we have so many eligibility examiners. Yet he was surprised how independently most everyone worked.

¹³There is also the TEAMS Help Desk. It is an 800 number with workers available to answer questions. However, the policy is that staff are suppose to go through a supervisor for assistance before calling the Help Desk, and to use the Help Desk only as a last resort.

¹⁴When I first went to Helena to participate in the system testing, I was shown how to log onto the system, given a TEAMS Handbook, and six cases to process. I was
(continued...)

After the first two-months of conversion were behind us, everyone began establishing a regular routine for managing their caseload. Staff appeared to be comfortably settling in with the new system, and it was not uncommon to hear the comment around the Missoula office, "I cannot image not having TEAMS."

¹⁴(...continued)
entering information into computer without having any formal training and only the TEAMS Handbook as a guide on how to enter information. I knew it was possible to find answers to many of their questions, if they only took the time to look in the Handbook.

CHAPTER III

QUESTIONNAIRE RESULTS

In this chapter, I will present the results for both the first and second questionnaires and comment on influences which may have affected the results.

Halo Effect

Social science researchers generally anticipate, prior to administering a questionnaire for a training program, that a strong initial positive or negative impression will occur. This common source of error is referred to in the social sciences as the "halo effect." This is the tendency for an irrelevant feature of a unit of study to influence the relevant feature in a favorable or unfavorable manner.¹

The "irrelevant feature" in this situation is the increasing caseload count statewide. Over the past year the AF caseload has increased by 9 percent, the GRA program by 27 percent, and the FS program by 10 percent,² yet the number of eligibility examiners employed to process and

¹Stephen Isaac and William B. Michael, Handbook in Research and Evaluation: For Education and the Behavioral Sciences, 2d ed., (San Diego: EdITS Publishers, 1987), p. 85.

²SRS Budget Modification Request, 1995 Biennium.

maintain these cases has remained relatively unchanged.¹ Application processing, prior to TEAMS, was highly paperwork intensive, and this affected employee morale.

Prior to TEAMS, all notices and budget calculations were hand written and done by the eligibility examiner. Depending on what assistance the client is applying for or receiving, the eligibility examiner is responsible for notifying the client, service providers, and other staff within SRS concerning the determination of benefits.

TEAMS has replaced the number of hand written notifications with computer generated notices--some of which are automatic, if certain information is not entered into the computer by a specific date. Processing information using the old method was becoming unmanageable, and staff were anxiously awaiting some relief from this paperwork "nightmare."

Staff finished the five day training session with a very positive impression of TEAMS. Afterwards, an atmosphere of certainty prevailed in the Missoula office that the new system would deliver relief from the monotonous work load of monthly caseload maintenance. This initial impression was likely to have influenced how the

¹Missoula is known for having a very high turnover rate for eligibility examiners. The office is seldom fully staffed for longer than six months at a time. When staff leave, the other eligibility examiners have to cover a share of the caseload that was vacated, until new staff are hired and trained. It can be three months before a new worker is fully trained and ready to cover a caseload.

participants responded to the first questionnaire.

Table 5.1 lists the responses to the question, "What is your overall rating of the TEAMS training?" This question was asked immediately upon completing the TEAMS training and again in late January after staff had four months to work with the new system. In September, 69 percent of the participants rated the training to be EXCELLENT. Yet four months later, only 32 percent of the participants thought the training had been EXCELLENT.

Table 5.1 What is your overall rating of the TEAMS training?

		Initial Training September 1991, #1		Follow-up January 1992, #2	
EXCELLENT	7	69%	(31)	32%	(12)
	6	29	(13)	38	(14)
	5			14	(5)
AVERAGE	4	2	(1)	11	(4)
	3			3	(1)
	2				
POOR	1			3	(1)
Totals		(N=45) ⁴		(N=37)	

The initial positive impression of the training could be attributed to the worker's negative attitude toward the manual processing of their monthly caseload. In this

⁴A total of 45 participants attended the TEAMS training in September: 8 management, 1 central office staff person, and 39 eligibility examiners and clerical staff. Since then, two staff have terminated employment with SRS and one supervisor retired. These people and the central office person were not asked to complete the second questionnaire. Forty-one questionnaires were distributed in late January; and forty were returned. Three people did not respond to this specific question.

instance, the halo effect would be more powerful.⁵

A total of eleven questions were asked on the first questionnaire. This questionnaire employed a combination of summated rating scales which measured the participant's attitude toward various aspects of the training; open-ended questions to seek the participant's spontaneous thoughts about the training; and closed-ended questions which forced the participants to choose a specific "yes/no" response to the question.

User Positions and Roles

The TEAMS training was designed to train SRS personnel on the specific functions they will perform on the system.⁶ In this training assessment, responses from "staff" are differentiated from those of "management," and then a combined score is reported for both.⁷ Due to the different

⁵Ibid., p. 86.

⁶BDM and Andersen Consulting, "The Economic Assistance Management System, Training Plan," p. 5, Department of Social and Rehabilitation Services, September 1990. All users--clerical to administrative officers--received the same training and completed the same exercises. Thus for some, the training was not appropriate for their specific job duties. For example, Management Report and Caseload Control (a management function) was touched upon in the training, but how to use these specific features of the TEAMS system was extremely brief.

⁷A problem in the design of the questionnaire became apparent when viewing the results: some of the management participants did not indicate they are management, as they were requested to do. In both the first and second questionnaire, there are two management questionnaires that could not be differentiated from staff. I might note, that
(continued...)

user roles and functions each participant will perform on the system, it is important to make this distinction. Because of management's role, and the user role which distinguishes them from staff, it has been very informative to see the differences in the overall group response to the TEAMS training.

Questionnaire #1

Question #1. What is your overall rating of the TEAMS training?

TABLE 5.2		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
EXCELLENT	7	74% (29)	33% (2)	69% (31)
	6	26 (10)	50 (3)	29 (13)
	5			
AVERAGE	4		17 (1)	2 (1)
	3			
	2			
POOR	1			
TOTALS		(N=39)	(N=6)	(N=45)

Question #2. Were you informed of the training objectives? If yes, were the training objectives met?

All of the participants responded "yes."

¹(...continued)

many of the staff did not make this distinction either. But that was not as much of a problem, because there are only the two variables--management or staff.

Question #3. Were the instructors' methods (lecture, hands-on experience, etc.) appropriate for learning the training materials?

TABLE 5.3		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
EXCELLENT	7	67% (26)	50% (3)	64% (29)
	6	31 (12)	33 (2)	31 (14)
	5	3 (1)		2 (1)
AVERAGE	4		17 (1)	2 (1)
	3			
	2			
POOR	1			
Totals		(N=39) ¹	(N=6)	(N=45)

Question #4 How effective were the instructors in presenting the training material (organization, maintaining interest, meeting training objectives)?

TABLE 5.4		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
EXCELLENT	7	74% (29)	67% (4)	73% (33)
	6	26 (10)	17 (1)	24 (11)
	5			
AVERAGE	4		17 (1)	2 (1)
	3			
	2			
POOR	1			
Totals		(N=39)	(N=6)	(N=45)

Question #5 Do you think the information in this training has prepared you to use the relevant functions of TEAMS?

All of the participants responded "yes."

¹Note: Percentages are rounded to next whole number.

county was missing.

The format for the second questionnaire was changed somewhat from the first. There was only one "yes/no" question on the second questionnaire, and some of the questions which were "yes/no" on the first questionnaire were arranged into a Likert scale. The participants responded on a scale of seven equal degrees of intensity ranging from EXTREMELY WELL or VERY EFFECTIVE to NOT AT ALL.

Questionnaire #2

Question #1 How well did the September training session prepare you for the new TEAMS technology?

TABLE 5.8		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
EXTREMELY WELL	7	20% (1)	20% (1)	20% (8)
	6	29 (10)		25 (10)
	5	26 (9)		23 (9)
AVERAGE	4	23 (8)	40 (2)	25 (10)
	3	3 (1)	40 (2)	8 (3)
	2			
NOT AT ALL	1			
Totals		(N=35)	(N=5)	(N=40)

Question #6 How would you rate the exercises instructions?

TABLE 5.5		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
VERY EFFECTIVE	7	41% (16)	17% (1)	38% (17)
	6	38 (15)	67 (4)	42 (19)
	5	8 (3)		7 (3)
AVERAGE	4	8 (3)	17 (1)	9 (4)
	3	5 (2)		4 (2)
	2			
	1			
Totals		(N=39)	(N=6)	(N=45)

Question # 7 Did the lecture prior to each of the exercises give you enough information to properly complete the exercises?

TABLE 5.6		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
YES		97% (36)	100% (6)	98% (42)
NO		3% (1)		2%
Totals		(N=37) ⁹	(N=6)	(N=43)

Question #8 How would you rate the overall usefulness of the exercises?

TABLE 5.7		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
VERY EFFECTIVE	7	74% (29)	67% (4)	73% (33)
	6	15 (6)		13 (6)
	5			
AVERAGE	4			
	3			
	2			
POOR	1			
Totals		(N=39)	(N=6)	(N=45)

⁹Two of the questionnaires had no response.

Question #9 Did the instructors seem well informed on the training material?

All of the participants responded "yes."

The last two questions on the questionnaire, question number 10 and 11, were open-ended. Participants were asked to identify the two most helpful, and the two least helpful, elements of the training session. The comments from these questions will be incorporated into the "Participant Responses" section of the next chapter. I was disappointed that more of the participants did not take the opportunity to express their ideas about the training. It is possible that the training experience was uncertain for some, and to ask the participants to offer constructive comments may be an indicator of the lack of understanding on the part of some or beyond the experiences of the participants.¹⁰

The second, follow-up, questionnaire was distributed January 28. At this time in the month, all of the regular monthly issuance has been completed for the most part. Generally, workers are completing late monthly reports and processing new cases. The end of the month and the first week of the next month are used by workers to catch-up, before the next wave of monthly issuance begins all over again. The return rate of the second questionnaire was very high at 98 percent. Only one questionnaire from Missoula

¹⁰David and Chava Nachmias, Research Methods in the Social Sciences, 2d ed., (New York: St. Martin's Press, 1981), p.214.

Question #2 Do you think the information in the training prepared you to use the relevant functions of TEAMS--for example, registering an application, benefit issuance, client inquiry, etc?

TABLE 5.9		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
VERY EFFECTIVE	7	35% (12)		31% (12)
	6	24 (8)		21 (8)
	5	18 (6)	40 (2)	21 (8)
AVERAGE	4	21 (7)	40 (2)	23 (9)
	3	3 (1)	20 (1)	5 (2)
	2			
NOT AT ALL	1			
Totals		(N=34) ¹¹	(N=5)	(N=39)

Question #3 How effective were the exercises at preparing you for real life situations?

TABLE 5.10		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
VERY EFFECTIVE	7	23% (8)		21% (8)
	6	29 (10)		26 (10)
	5	14 (5)	25 (1)	15 (6)
AVERAGE	4	26 (9)		23 (9)
	3	3 (1)	50 (2)	8 (3)
	2	3 (1)	25 (1)	5 (2)
POOR	1	3 (1)		3 (1)
Totals		(N=35)	(N=4) ¹²	(N=39)

¹¹This question was not answered by one staff participant.

¹²One of the management participants did not rate this question or the ones to follow. Instead, this participant wrote, "I was able to get through the exercises, despite never having worked eligibility."

Question #4 **Were the instructors' methods (lecture, hands-on experience, etc.) appropriate for learning the training materials?**

TABLE 5.11		<u>Staff</u>		<u>Management</u>		<u>Totals</u>	
VERY EFFECTIVE	7	43%	(15)			38%	(15)
	6	26	(9)	25%	(1)	26	(10)
	5	17	(6)	25	(1)	18	(7)
POOR	4	11	(4)	50	(2)	15	(6)
	3	3	(1)			3	(1)
	2						
NOT AT ALL	1						
Totals		(N=35)		(N=4)		(N=39)	

Question #5 **Did the instructors seem well informed on the training material?**

TABLE 5.12		<u>Staff</u>		<u>Management</u>		<u>Totals</u>	
WELL INFORMED	7	71%	(25)	25%	(1)	67%	(26)
	6	17	(6)	75	(3)	23	(9)
	5	9	(3)			8	(3)
AVERAGE	4	3	(1)			3	(1)
	3						
	2						
NOT AT ALL	1						
Totals		(N=35)		(N=4)		(N=39)	

Question #6 **Did the training help you to become proficient in the use of reference sources available to you--for example, the TEAMS Handbook, TEAMS Job Aids, etc?**

TABLE 5.13		<u>Staff</u>		<u>Management</u>		<u>Totals</u>	
VERY EFFECTIVE	7	31%	(11)			28%	(11)
	6	26	(9)	25	(1)	26	(10)
	5	23	(8)	25	(1)	23	(9)
AVERAGE	4	20	(7)	25	(1)	21	(8)
	3						
	2						
NOT AT ALL	1			25	(1)	3	(1)
Totals		(N=35)		(N=4)		(N=39)	

Question #7 **Did you read the TEAMS Self-Study Course which was given to you approximately two weeks prior to the classroom training?**

TABLE 5.14	<u>Staff</u>	<u>Management</u>	<u>Totals</u>
YES	66% (23)	100% (5)	70% (28)
NO	34 (12)		30 (12)
Totals	(N=35)	(N=5)	(N=40)

Question number 8, 11, and 12 were open-ended questions. Participants were asked how the training could have been more beneficial; what aspects of TEAMS are you still uncomfortable with; and what follow-up training would be helpful? Responses to these three questions will be presented in the "Participant Responses" section in the next chapter.

Question #9 **Now that you have had four months to work with TEAMS, how different are your perceptions now from what they were in September?**

TABLE 5.15		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
VERY DIFFERENT	7	31% (10)	25% (1)	31% (11)
	6	13 (4)		11 (4)
	5	16 (5)		14 (5)
AVERAGE	4	19 (6)	25 (1)	19 (7)
	3	13 (4)	25 (1)	11 (4)
	2	3 (1)	25 (1)	6 (2)
NOT AT ALL	1	6 (2)	25 (10)	8 (3)
Totals		(N=32) ¹³	(N=4)	(N=36)

¹³It appears that some of the participants did not see the instructions on the front of the questionnaire to turn the paper over and missed answering these questions.

Question #10 What is your overall rating of the TEAMS training?

TABLE 5.16		<u>Staff</u>	<u>Management</u>	<u>Totals</u>
EXCELLENT	7	36% (12)		32% (12)
	6	39 (13)	25% (1)	38 (14)
	5	15 (5)		14 (5)
AVERAGE	4	9 (3)	25 (1)	11 (4)
	3		25 (1)	3 (1)
	2			
POOR	1		25 (1)	3 (1)
Totals		(N=33)	(N=4)	(N=37)

This concludes the tabulation results. In the next chapter, inferences will be drawn from the above results, specific participant concerns will be presented, and recommendations will be suggested for enhancing user procedures.

CHAPTER IV
FINDINGS AND RECOMMENDATIONS

"I cannot imagine not having TEAMS," said Fran Landt, an eligibility examiner for 10 years at the Missoula OHS who had no computer experience prior to working with TEAMS. Other workers expressed the same or similar comments and appear to be equally as comfortable with the new system.

The eligibility determination process has been changed dramatically. Whatever anxiety or skepticism existed about learning how to use a computer and what could be expected has probably been forgotten.¹ The bottom line is: can staff perform their job duties? Yes they can, and in a very timely and effective manner. Because of being able to perform their job more efficiently, TEAMS has helped to

¹Six months after conversion, a co-worker approached me and proudly held out a book for me to see--it was a textbook on WordPerfect. She decided that it was time for her to learn how it use it. All of the computers in the Missoula office are setup for WordPerfect. Yet, few workers have taken the opportunity to use it, probably because they do not know how to use it. Ironically, when the state installed the computers in September 1991, one month before conversion, it was with the idea that if staff could familiarize themselves with WordPerfect, there would be less anxiety about TEAMS. I am reminded of the comment I cited at the beginning of Chapter I by another co-worker who expressed her concern that "TEAMS would be dumped on us with little or no training." It appears that workers are now less apprehensive and are able to expand their use of a computer because of TEAMS.

reduce stress caused by job duties and to improve worker attitudes toward their job.¹

In this final chapter, I will examine the significance of the questionnaire results which have been presented and suggest possible reasons for the responses.

Limitations

The sample I am studying is small. The weakness in this survey is the number of participants represented. The larger the number represented, the more confidence one has in the conclusions being drawn about the population. Yet, the survey results present a good "snapshot" and a useful format for the counties studied.

There were a total of forty-five participants at the TEAMS training session, with only six identified participants as being management personnel. One management participant scoring one point either direction on the questionnaire changed the results by a much greater value than a similar response from a staff participant. One management participant's score represents 17 percent of

¹During the initial TEAMS training, participants were warned that the system might find computation errors which have gone unnoticed for months, or possibly years. Prior to TEAMS, the attitude toward correcting an error was to correct it for the current benefit month, and if the client did not complain or the case was not audited by Quality Control (QC), leaving the past benefits as they were. The reason for this was the time involved to correct an error could be extremely lengthy and involved. Depending on the error, the process and time to correct a problem now is only a fraction of what it was before.

management participants; compared to one staff participant response representing only 3 percent.

This paper has explored the influences surrounding the TEAMS training, and to some extent, the processes involved in this event. As a TEAMS super-user and an eligibility examiner at the Missoula OHS, I have a unique vantage point derived from my understanding of what the job requires.

Findings

When I viewed the results of the first questionnaire, I was surprised to find that 74 percent of staff thought the initial TEAMS training was EXCELLENT, compared to only 33 percent of management believed the training to be EXCELLENT. This difference in attitude was puzzling. Yet, as I observed how each of the two participant groups worked with TEAMS--their relationship to the system--I could understand the different scores.

As an eligibility examiner, I am held accountable for the caseload that has been assigned to me, whereas management's role is to direct and assist their workers and not to become actively involved in "doing" the worker's job.³ This has been the practice for the three years I

³Income Maintenance Supervision: On the Firing Line, Department of Health and Human Services Publication No. 80-08002, Washington, January 1986, p. 2. I do not personally agree with this viewpoint. In a time of crisis, if workers see management "rolling-up their shirt sleeves" to assist staff, it can be a tremendous morale booster. When workers leave, it is expected that other workers pick-up a portion of the vacant position's casework.

have been employed by Missoula county.

Because of the different job responsibilities of staff verses management, staff use the system more than management.⁴ The eligibility examiner supervisor does some inquiry, case maintenance, benefit authorization, and issues notices. However, this is on a relatively intermittent basis compared to the eligibility examiner who uses the system throughout the work day.

Another explanation for the different responses between management and staff is management's role in performance evaluation and how they interpret performance standards and objectives. A "standard" rating is defined, in part, as performing job duties in an accurate and timely manner, while maintaining good working relationships. Standard is in the middle of five performance evaluation measures on the Employee Performance Appraisal form, and may well have been equated with AVERAGE on the questionnaire. Thus, "standard" and AVERAGE may have been interpreted by management as just performing your job duties.

As reported on the second questionnaire, staff's opinion of the initial training session went from 74 percent who believe the training to be EXCELLENT to only 36 percent.

⁴As mentioned earlier, in a large county such as Missoula, the job duties tend to be more specialized. The county director would not be reviewing cases the way the county director does in Broadwater county. The county director in a small county would probably be using the system in the same way as an eligibility examiner supervisor in a large county.

The "halo effect" could have been a factor which influenced responses to the first questionnaire. During conversion and prior to the second questionnaire being distributed, I observed an annoyance expressed by both management and staff that actual cases had not used for training. It was believed the training exercises did not reflect the complexity of cases and "real life circumstances" a worker regularly experiences in a case. Participants were asked how effective were the exercises at preparing them for real life situations. Only 23 percent of staff thought the exercises were VERY EFFECTIVE, compared to 74 percent on the first questionnaire who found their overall usefulness to be VERY EFFECTIVE.

No amount of training could ever prepare staff for all possible circumstances which occur in a case.⁵ A variety of examples were presented, and conversion support staff were in the county offices during the first two weeks of conversion to help smooth over the rough spots and to answer questions. The general consensus in the Missoula office is that the TEAMS training was the best training the state has provided.

⁵Mike Russell, from Andersen Consulting wrote the training exercises. He attempted to present a range of circumstances, using different TEAMS functions, to mirror actual job performance. There were a few minor inconsistencies in the training exercises that eligibility staff, who are conditioned to perform their job duties accurately, found disturbing.

Participant Responses

Questionnaire #1

When participants were asked to identify the two most helpful elements of the training, it was hands-on experience, trainer knowledge, and the training exercises that were mentioned most frequently. The exercises were presumably more meaningful to the eligibility examiners than to other staff and to management. One participant's comment was that clerical staff should have been paired with an eligibility examiner during the training, because eligibility examiners know policy and could more easily understand why something was handled in a particular way.⁶ Even though policy training was not part of the initial TEAMS training, because the lead trainer knew policy, she was able to offer explanations when needed.

The exercises were easy enough to follow and quite often told the participants what codes to enter on a particular screen. Participants were critical of this, because it did not encourage them to find the answer in available reference materials. During conversion, I noticed that staff would ask questions rather than take the time to look up the answer in the TEAMS Handbook.⁷ Since

⁶Management participants were often paired with management, and it may have been more beneficial had they been paired with an eligibility examiner as well.

⁷The TEAMS Handbook is not clearly indexed. The TEAMS Handbook Task X-Reference guide was developed to assist
(continued...)

conversion, staff have learned to use the Handbook more than they had been.¹ However, because the Handbook is poorly indexed, it can be frustrating to locate information, and it is not being fully utilized as a reference source.

Questionnaire #2

Before administering the second questionnaire, I wanted to make sure that staff had ample opportunity to use the various TEAMS functions on a regular basis, and that they were not still learning the basic procedures or going through the conversion process. When to distribute the second questionnaire was a judgement call on my part--I observed my co-workers and noted what questions were being asked of me. I thought if I waited too long before distributing the second questionnaire, what was actually learned in training might not be easily differentiated from what was learned later.

¹(...continued)

workers to find information in the Handbook, yet it is limited in its usefulness. TEAMS is modeled after the Hawaii Automated Welfare Information (HAWI) system, because Montana's public assistance programs most closely compare to Hawaii's. The TEAMS Handbook was copied, for the most part, from the HAWI Handbook.

¹Effective January 1, I was assigned a full caseload, and I was not as available as I had been during conversion to answer staff questions. I told management that I thought staff could answer many of their questions if they attempted to utilize the TEAMS Handbook more than they did. Staff were told that, because I had a caseload, they were to attempt to find the answer in the Handbook. If they could not find what they needed, then they were to go to their supervisor for assistance.

Participants had two full months, after conversion, to work their caseloads and to see how the system operated on a regular basis. Many of the same questions were asked on the second questionnaire. A few were reworded or put into a Likert scale format to get more specific responses from the participants.

When the participants were asked to suggest ways the training could be improved and made more beneficial, more time was the most common response. BDM attempted to make the best use of the allotted time. Due to the lack of time, many of the answers were supplied to the exercises. Many of the participants commented that there was considerable repetition and time used on the application registration process. This process is an important element and can be confusing. Simply written steps on the application registration process could have been included as part of a Job Aids guide.⁹

Fewer exercises with fewer applicants to register would have opened-up more time to look up answers in the Handbook, and allowed more time for variation in the example exercises. Other comments were that more time should have been allowed to make changes to cases, e.g., adding new

⁹Periodically, I was asked by management to write instructions for staff to use if it was believed the existing instructions were unclear. For example, procedures for registering an application (Appendix 4) and procedures for registering a monthly report (Appendix 5).

household members and an unborn to a case where multiple involvement units (IU's) exist.

During the five day training session, each of the approximately 133 screens were viewed on an overhead projector. Some of the less frequently used informational screens were briefly shown to the participants on the overhead projector; the screen's purpose was hastily identified; removed from the projector; and what the participants were told was soon forgotten. As one participant noted, there were too many screens to view in five days. After awhile, they all looked alike to someone who was unfamiliar with the new system. Another participant commented that knowing what sequence the screens followed for each program and program subtype, would be a useful reference guide.

Participants were asked to identify what aspects of the new system they were still uncomfortable with. Knowing what information is available on a screen and how to read this information were cited most often. The TEAMS Handbook has a picture of each screen in the system, with a definition of the various fields and what codes to use. This seems to indicate unfamiliarity with the TEAMS Handbook and an uncertainty as to what information is available in the Handbook and how to use it.

The final question on the questionnaire asked what type of follow-up training staff would find helpful. Several of

the participants wanted training on any changes to TEAMS, and some thought there should be refresher training twice a year. It was suggested that additional training provide more difficult exercises to practice with. These exercises would include complex IU's and other identified problem areas. Quick tips and short cuts for case maintenance and working with items that are not routinely used were other suggestions.

Recommendations

From the first day of conversion, staff adjusted to the new system very quickly. Conversion went smoothly for the Missoula office, and the backlog of pending applications that were more than 30 days old were quickly processed. I do not think there could be a better indication of the quality of the TEAMS training than this.

Looking back on the training experience, I suggest the following changes:

1. omit any screens that can be eliminated without jeopardizing the training. It was not necessary to view all screens in the five day training session. Subsequent discussions suggest that the information was forgotten;
2. allow fewer applicants to register in the module on application registration; and
3. introduce combination households and more complicated procedures earlier. After all, staff were not learning policy at the initial training, and if clerical staff and county directors had been paired with an eligibility staff person, this might have moved the pace of the training more quickly. All of the clerical staff in the Missoula region stayed

for the full five day training session. The training was designed so clerical could be excused after a review of the application registration sequence.

Staff commented they would have liked a list showing the sequence of screens for each major program and program subtype. When I was in Helena working on the system and acceptance testing, there was a chart on the wall the programmers used which indicated what screens were connected to which menus. This schematic was a highly technical design of the system, and fascinating to those of us who were there from the county offices. This particular schematic was too technical for most of us to understand. However, a simpler design could have been developed which would have enhanced user understanding of the system. Staff and management have frequently asked "how do I get to this menu from where I am now?" It is not uncommon to get an error message on the screen, "need to access from an appropriate menu." In frustration, staff have asked, "what menu will take me there?" A simple schematic which depicts what order the screens follow for each program is no different than wanting a road map if you are traveling in an unfamiliar city. Traveling in unfamiliar territory is what was happening to these new users of TEAMS. It would be of interest to staff if they could see the "big picture."

A "Quick Reference" guide was developed for TEAMS users. The guide is intended to be kept at computers for easy reference on how to sign on/off the system, changing

passwords, and frequently used program codes. It is a well used and a handy reference source for eligibility staff. I believe a guide should be developed for each major user group of TEAMS--clerical, eligibility, and management. For example, clerical staff have no use for "work registration" and "repayment plan" codes. A reference guide could be developed specifically for clerical which includes application registration procedures and inquiry functions. Management might find it useful to have quick access to information on the inquiry functions, notices, over/under payment, field warrant, and management reports and caseload control.

Conclusion

Staff settled into using TEAMS very quickly and seem to be fairly comfortable with the new system. Yet, some staff are like a little old lady who drives to the store-and-back each day along a fixed route which never deviates, when it comes to working with TEAMS. Staff know how to process their cases using a somewhat fixed routine, and they are developing new habits for monthly caseload maintenance based on some of the old methods. For example, staff were cautious to some degree about using the new Active Case Listing report which is generated monthly for each worker, and many workers continued to use a monthly report list up until it was finally terminated in March 1992.

At this point in the evolutionary process of TEAMS,

some advanced training would be beneficial. TEAMS users have passed through the initial period of adjustment to this change and are able to expand their understanding of the system. It might be helpful for some workers (especially new workers) if there are some "guides" developed on how to manage a TEAMS caseload. Also, some menus are unfamiliar, probably due to their lack of use. For example, the Table Maintenance Menu (TAME) screen was discussed briefly at training, but many staff are unaware of its existence and certainly do not know how to use it--or when to use it.¹⁰

Management is feeling somewhat frustrated by the monthly management reports they are receiving for caseload control purposes. As one supervisor stated, "these reports are just sitting on our desks because we do not know how to read them." No training was provided in this area, other than to draw attention to their existence. Some assistance needs to be provided on how management should be using these reports.

Prior to participating in the system and acceptance testing of TEAMS, I had no idea of the scope and the process involved in a project of this breadth and influence. For that brief four months I was in Helena, it was exhilarating to watch TEAMS take shape, and to work with other SRS staff and the people from BDM and Andersen Consulting. TEAMS was

¹⁰TAME provides such information as a list of all notices, zip code directory, all codes used by the system, current and past benefit amounts, etc.

and still is an exciting process to watch unfold.

Appendix 1

TEAMS TRAINING EVALUATION #1

1. What is your overall rating of the TEAMS training?

EXCELLENT |-----|-----|-----|-----|-----|-----|
 AVERAGE POOR

2. Were you informed of the training objectives? If yes, were the training objectives met? YES NO

3. Were the instructors' methods (lecture, hands-on experience, etc.) appropriate for learning the training material?

EXCELLENT |-----|-----|-----|-----|-----|-----|
 AVERAGE POOR

4. How effective were the instructors in presenting the training material (organization, maintaining interest, meeting training objectives)?

EXCELLENT |-----|-----|-----|-----|-----|-----|
 AVERAGE POOR

5. Do you think the information in this training has prepared you to use the relevant functions of TEAMS?

YES NO

6. How would you rate the exercise instructions?

EASY TO FOLLOW |-----|-----|-----|-----|-----|-----|
 AVERAGE HARD TO FOLLOW

7. Did the lecture prior to each of the exercises give you enough information to properly complete the exercises?

YES NO

8. How would you rate the overall usefulness of the exercises?

VERY EFFECTIVE |-----|-----|-----|-----|-----|-----|
 AVERAGE NOT EFFECTIVE

9. Did the instructors seem well informed on the training material?

YES NO

10. Please identify the two most helpful elements of the training program:
 - 1.
 - 2.
11. Please identify the two least helpful elements of the training program:
 - 1.
 - 2.

Please add any additional comments or suggestions you about the training below. Thank you for your assistance.

Appendix 2

TEAMS TRAINING EVALUATION #2

YOUR POSITION: MANAGEMENT/STAFF Please circle one.

1. How well did the September training session prepare you for the new TEAMS technology?

Scale: EXTREMELY WELL |-----| AVERAGE |-----| NOT AT ALL

2. Do you think the information in the training prepared you to use the relevant functions of TEAMS--for example, registering an application, benefit issuance, client inquiry, etc?

Scale: VERY EFFECTIVE |-----| AVERAGE |-----| NOT AT ALL

3. How effective were the exercises at preparing you for real life situations?

Scale: VERY EFFECTIVE |-----| AVERAGE |-----| NOT AT ALL

4. Were the instructors' methods (lecture, hands-on experience, etc.) appropriate for learning the training material?

Scale: VERY EFFECTIVE |-----| AVERAGE |-----| NOT AT ALL

5. Did the instructors seem well informed on the training material?

Scale: WELL INFORMED |-----| AVERAGE |-----| NOT AT ALL

6. Did the training help you to become proficient in the use of reference sources available to you--for example, the TEAMS Handbook, TEAMS Job Aids, etc?

Scale: VERY EFFECTIVE |-----| AVERAGE |-----| NOT AT ALL

7. Did you read the TEAMS Self-Study Course which was given to you approximately two weeks prior to the classroom training? Y N
If no, why not: _____

(OVER)

8. What suggestions do you have that could have improved the training and made it more beneficial to you?

9. Now that you have had four months to work with TEAMS, how different are your perceptions now from what they were in September?

VERY DIFFERENT |-----|-----|-----|-----|-----|-----|
 AVERAGE NOT AT ALL

10. What is your overall rating of the TEAMS training?

EXCELLENT |-----|-----|-----|-----|-----|-----|
 AVERAGE POOR

11. What aspects of TEAMS are you still uncomfortable with?

12. What kind of follow-up training would you find helpful?

Appendix 3

PROCEDURES FOR CONVERTING YOUR FIRST CASES

1. Take a deep breath and RELAX--you cannot break TEAMS.
2. In the Special Processing Guide, read the section titled "Conversion" beginning on page Sp-13.
3. Each specialist will be assigned a new USER ID (CS____) number and a temporary PASSWORD. You will need to change your temporary password before converting your first case. See instructions for changing your password in the Quick Reference guide or in your TEAMS Handbook, section 106, page 1-25. You can use the same password for TEAMS that you are using for DC Prod. Your password for TEAMS cannot exceed eight alpha or numeric characters.
4. After you change your password, continue with the sign on procedures. These instructions are in your Quick Reference guide or in the TEAMS Handbook, section 102, page 1-3.
5. TEAMS will display the System Selection Menu (SYSE). Tab down and select the Client Conversion Menu (COME). When this menu appears, tab down and select Conversion Client Register (CORA). DO NOT PRESS ENTER YET. Tab down and type in your first case number and the benefit month of 1091 (See attached photo copy of SYSE & COME).
6. From this point on, follow the directions per the Special Processing Guide for converting your cases. TEAMS automatically displays the required screens for each Involvement Unit (IU). All you will need to do is press CTRL/ENTER, and TEAMS will access the screens for you. If a client has no resources, for example, simply press CTRL/ENTER to access the next screen in the sequence.
7. REMINDER: If you are working a case which is a "non-monthly reporter," you will need to change the FS MR indicator to "N" on the MR History/Requirement screen (MRHR). Also, since these clients are in prospective budgeting, you will need to change the Budgeting Method on the Case Maintenance Menu (CAMM) to a "P." You can do this after entering the participation codes on the Setup Participations' screens (SEPA). Before leaving SEPA, type CAMM in the "NEXT" field and press CTRL/ENTER. Enter "P" as the Budget Method on CAMM, tab down to the "NEXT" field and type SEPA. Press

CTRL/ENTER. This will take you back to SEPA, and from there by pressing CTRL/ENTER, you will continue the default flow sequence of screens.

8. After all the case data has been entered, approve benefits on the appropriate approval screens (AFPD, MABD, IMBD, QMBD, INCU, SSIA, EMAA, FSAD, SMED). If you inadvertently deauthorize benefits by changing an income amount, for example, you may want to inquire on AFBH, MABH, or FSBH screens to verify that the benefits have been authorized. If the benefits have not been authorized the entire line of information is highlighted.
9. If the client's benefits will change for 1191, request the appropriate notice from the Notice Request screen (NORE) or delete the notice if there is no change in benefits. Lastly, if you want to request a budget print for the case file to indicate the onset of TEAMS, you can do this on the Budget Request Print screen (BURP), but this is optional. Instructions for this are in the TEAMS Handbook, page 3-223.

SYSE

SYSTEM SELECTION

10/01/91

09:08:09

PAMEL S

_ CLME CLERICAL MENU
 _ ELTM ELIGIBILITY TECH MENU
 x COME CLIENT CONVERSION
 _ TAME TABLE MAINTENANCE MENU
 _ NEXT NEXTING MODULE

CASE NUMBER : 000000
 BENEFIT MONTH : 1191
 PROGRAM TYPE :
 SUBTYPE :
 BUDGETING METHOD :
 CLIENT SSN : 000000000
 CLIENT NUMBER : 0000000
 MR BUDGET MONTH : 0000
 MA/FS DOC NUMBER :

NEXT-->

COME

CONVERSION MENU

10/01/91

09:08:42

PAMEL S

_ CLIN CLIENT INQUIRY
 x CORA CONVERSION CLIENT REGISTR
 _ APEM APPLICATION ENTRY MENU
 _ CAP1 CASE PROFILE 1

CASE NUMBER :
 BENEFIT MONTH : 1191

NEXT-->

Appendix 4

APPLICATION REGISTRATION

Clients not known to TEAMS

CLIR Go to Client/Inquiry Registration Menu and request:

INOP You must inquire on every client before you can save them for registration, regardless of the fact that you may already know they are not on the short list. If the client is not on the short list, press F2 and select:

SANC Enter the demographic information and press CTRL/ENTER. The message will appear on the screen, "new client saved for registration." INOP and SANC for all clients not already known to TEAMS.

RANC Select this function and enter your County/Unit number.

Clients known to TEAMS

CLIR Go to Client/Inquiry Registration Menu and request:

INOP Again, you must inquire on every client before you can save them for registration. If only one client matches the surname you have entered, TEAMS will display:

CLPR If more than one match is found, TEAMS will display:

CLIS Select the sequence number for the client you want to inquire on. CLPR will appear. If the client displayed is the client you want, enter "Y" to save this client for registration. Press CTRL/ENTER and TEAMS will return you to:

CLIR NOTE: No message will appear on this screen as did above that this client has been saved for registration. Just know that this client has been saved for registration. After all clients have been inquired on and saved for registration, select:

RANC Enter your County/Unit number and press CTRL/ENTER.

ADDING NEW AND EXISTING CLIENTS TO CASE

This process is almost identical to the registration process, with the exception that it is done on the CLIM (Client Inquiry/Maintenance) screen rather than CLIR. You must inquire before any of the maintenance functions can be performed. CLIM is the screen where you can:

add a client to a new or existing case;

delete a client from a case:

change the client's identifying information, e.g. the name is spelled incorrectly or the client got married, birth date, and change the SSN if not already verified by social security;

maintain a list of previously used alias;

delete a client from TEAMS, and;

record that an unborn child has been born.

If the client is the client you are inquiring about, enter "Y" to save this client for maintenance. This process is almost exactly the same as registering an application, except TEAMS is asking if you want to save for maintenance, rather than for registration. The system will return you to the CLIM screen.

An existing client is a client that is known to TEAMS and appears on the short list. A new client is one you do not find on TEAMS and have to enter the demographic information for. If the client is known to TEAMS, you will select ADEC (Add Existing Client to Case), if the client is new to TEAMS, select ADNC (Add New Client to Case).

Lastly, enter the case number and the benefit start period date. No message will appear that the client has been added to the case. Go to SEPA and check to see if the new client appears in the IU for the particular benefit month you are working.

Appendix 5

PROCEDURES FOR REGISTERING MONTHLY REPORTS

1. Sign on to TEAMS.
2. Read in the TEAMS Handbook, section 504, page 5-11.
3. TEAMS will display the System Selection Menu (SYSE). Tab down and select Clerical Menu (CLME).
4. TEAMS will display CLME. Tab down and select MR Registration (MRRE). DO NOT PRESS ENTER YET. Tab down and enter the MR BUDGET MONTH. In October, that will be 0991. Press CTRL/ENTER.
5. TEAMS will display MRRE. Enter the date the MR's you are registering were received. IMPORTANT: If no date is entered, TEAMS will default to the current date. This could result in a system generated letter telling the client that their monthly report is late when in fact it is not. It might be best to sort the MR's in date order prior to registering them.
6. Enter the case number and indicate with a "Y" if this is a monthly or a quarterly report you wish to register. You can register as many as 14 cases on each screen. Press CTRL/ENTER. TEAMS will display the short form case name and the specialist responsible for the case. Go to the "Complete AF FS" field and enter a "Y" for both AF and FS, if the monthly appears to be complete. If there are obvious omissions from the monthly report--for example--wage stubs are not submitted, put an "N" in the AF and FS field. Attach a note to alert the specialists it is incomplete. The specialist will then send the appropriate notice and set an alert. NOTE: by setting the indicator to "N," this will generate a notice situation for the specialist on the Notice screen (NORE). The specialist will still need to send the appropriate notice and enter the date on which the notice for an incomplete MR was requested on this screen.
7. If there are more than 14 monthly reports to register at one time, tab to the "More to Register" field and type "Y." This will display a clean screen for more to register. CAUTION: If there are no more MR's to register, do not enter a "N." You might lose what is on your screen. When the job is finished, press CTRL/ENTER. MR's are registered and the cases are updated.