



STATEWIDE BUSINESS PROCESS

FAMILY INVESTMENT ADMINISTRATION

AUGUST 26, 2024

MARYLAND DEPARTMENT OF HUMAN SERVICES
25 S Charles Street Baltimore, MD 21201

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1. Background

This Standard Business Process (SBP) covers tasks assigned and not assigned in the Statewide Process Management (SPM). Local department business processes impact Application Processing Timeliness. This SBP streamlines mandatory processing functions. This guidance works in tandem with SPM, a model under which we manage our work determining eligibility for public benefits.

SPM is for specified Family Investment Administration (FIA) benefit programs within the Maryland Department of Human Services (MDHS). The process is achieved by standardizing business procedures and assigning equitable tasks to the same classifications across the state. Applications, Redeterminations, and Interim Changes received from any jurisdiction are assigned using a case manager allocation percentage logic. The goal is to leverage available resources across the state to maximize efficiency in processing cases, executing a no-wrong-door principle, reducing eligibility decision times, and providing G.O.L.D. standard customer service.

The Eligibility and Enrollment (E&E) system will auto-distribute SPM assignments using the Enhanced Worker Portal Dashboard also known as the SPM Dashboard. Only work items submitted through the Consumer Portal will be assigned to SPM during the initial phases.

2. Purpose

The purpose of the SPB is to provide a detailed process that ensures all Applications, Redeterminations, and Interim Changes for services received by the LDSS are processed accurately and updated without delay. The SPM streamlines the workflow for customers and staff. The LDSS is to continue adhering to established federal and state guidelines around timeliness, access, and accuracy.

3. Intent

The SBP will allow residents of Maryland to experience accurate and timely delivery of the service requested. SBP distributes the workload among staff equally and streamlines the customer experience.

4. Scope

When there are associated programs attached to an assigned task, the SBP provides the steps for effectively administering:

- A. Emergency Assistance to Families with Children (EAFC)
- B. Expedited SNAP (XSNAP)
- C. Non-MAGI Medical Assistance (MA)
- D. Public Assistance to Adults (PAA)
- E. Supplemental Nutrition Assistance Program (SNAP)
- F. Temporary Cash Assistance (TCA)
- G. Temporary Disability Assistance Program (TDAP)

5. Prerequisites

Availability and access to

- A. Eligibility and Enrollment (E&E)
 - 1. Enhanced Worker Portal Dashboard
 - 2. Statewide Process Management (SPM) Reports
 - 3. Qlik Reports
 - 4. Electronic Content Management (ECM)
 - 5. Monthly Statistical Reports
 - 6. Application Data
 - 7. Weekly Application Compliance Data
 - 8. Redetermination Data
 - 9. FIA Operations Reports at the LDSS
 - 10. DHS Central also uses data on the LDSS filled and vacant positions, Visitor Registration Data, and Statewide Office visits.

6. Responsibilities

- 1. The Family Investment Administration (Central) is responsible for:
 - a) Managing resource allocations,
 - b) Providing general training,
 - c) Monitoring the SBP to ensure that it is working as intended,
 - d) Training the LDSS Deputies and Assistant Directors on the Enhanced Dashboard and how to use it as a management tool,
 - e) Updating the SPM workload allocation chart every month. Currently, all employees in the Family Investment Specialist I and Family Investment Specialist II classifications are counted in the allocation. To notify Central of staff belonging to these classifications that are expected to be

on an extended leave or a long-term temporary assignment this [Resource Level Notification Form](#) is required by the Office of Local Operations. Click on the hyperlink to access the form.

2. The FIA Deputy/Assistant director at each LDSS is responsible for:
 - a) Providing staff with reports for daily operations and assignments,
 - b) Submitting the Resource Level Notification Form when necessary.
3. All Supervisors will:
 - a) Monitor and track staff assignments to ensure case managers are adhering to the same case processing standards. Monitor all Applications, Redeterminations, Alerts, and Interim Changes.
 - b) Complete mandatory pre-reviews, in addition to the responsibilities for supervisors included in the task section of this SBP. Pre-reviews are established to help identify and address errors and detect areas that require further staff training or clarification. Supervisors are required to review 10% of applications processed and 15% of redeterminations processed by their direct reports monthly.¹

7. SPM Participating Jurisdictions

All jurisdictions in the State of Maryland except Montgomery County participate in the SPM Model.

8. Central SPM Points of Contact

Dr. Chima Nathan - Director, Office of Local Operations	Chima.Nathan@maryland.gov
Theresa I. Williams - Assistant Director, Office of Local Operations	Theresa.williams2@maryland.gov

¹ This quota is established by the Office of the Inspector General (OIG) and Management Evaluation.

9. Regional SPM Supervisors

Thomas Horman	Michele Bowie	Genice Phillips
Baltimore City	Prince George's	Baltimore County
	Anne Arundel	Harford
Wicomico	Washington	Charles
Howard	Frederick	Cecil
Allegany	Saint Mary's	Carroll
Calvert	Dorchester	Worcester
Somerset	Caroline	Talbot
Garrett	Kent	Queen Anne's

10. SPM Regional Supervisor Responsibilities

- A. Perform daily reviews on a randomized sample of SPM tasks assigned outside the jurisdiction where the customer resides.
 - 1) Focus areas are timeliness and accuracy of the task by the assigned jurisdiction,
- B. Document notable processing trends,
- C. Discuss trends (delays, eligibility errors, etc.) with the LDSS leadership and provide technical assistance,
- D. Escalate issues to the FIA leadership as necessary,
- E. Serve as a Superuser with the ability to approve claims when the direct supervisor is on extended leave.

11. Bi-Weekly SPM Meetings

To stay engaged with staff, supervisors, and leadership, DHS Central holds recorded bi-weekly meetings with the local departments to discuss issues, concerns, best practices, and updates. This setting allows everyone at the LDSS level to give critical feedback about the E&E system and the SPM model. SPM Supervisors and the Director of Local Operations provide feedback and guidance around concerns submitted by the LDSS.

12. No Wrong Door

“No Wrong Door” enables Maryland residents to access FIA benefits and

services at any of our local offices. “No Wrong Door” requires all LDSS employees who interact with customers to understand all programs and services available to address customers' needs and concerns. All applications must be registered in E&E at the LDSS where they are received. However, applications for TCA, TDAP, PAA, and EAFC will be transferred to the residential jurisdiction upon registration. The receiving jurisdiction will upload all documents in E&E and narrate before sending the case to the jurisdiction where the customer resides. The LDSS Points of Contact Sheet is accessible via the E&E Worker Portal and will be updated to reflect the points of contact across jurisdictions to assist with warm hand-offs.

SPM is focused on assigned tasks that are received through the Consumer Portal via E&E. However, under the “No Wrong Door” policy, all walk-in customers receive the service they need. If a customer resides in another jurisdiction, they will also receive the address of the LDSS office responsible for continued case maintenance.

- A. If the customer provides a redetermination, the case must be initiated, and actions narrated.
- B. If the customer's Cash application is registered within 24 hours of receipt, the receiving jurisdiction will identify the point of contact in the residential jurisdiction and a warm hand-off will be completed with a transfer if needed.
- C. All documents must be uploaded into Case Documents in E&E upon receipt per AT 24-07 Proper Handling of Case Documents/Records.
- D. All documents scanned or uploaded into ECM are immediately displayed in Case Documents.
- E. If an Interim Change is completed, there are no outstanding verifications, and the case remains active after running eligibility, do not transfer the case. No further action is required on the case after narration.
- F. All actions must be narrated.
- G. Appeals
 - 1) The “No Wrong Door” policy requires all LDSS employees who interact with customers to understand the interim change, redetermination, and application process.
 - a) If an interim change, redetermination, or application is processed, closed, or denied by a jurisdiction other than the residential jurisdiction, any appeal because of the action, will be handled by the customer's residential jurisdiction.

- b) If it is determined that the case action that was the subject of the appeal was incorrect, the jurisdiction that made the error is responsible for correcting the case.
- c) All actions must be narrated, and all documents must be uploaded in ECM within specified time frames.

H. Returned Verification

If a verification is submitted or received by an office that is outside the customer's home jurisdiction, the document must be uploaded into the respective Case Documents, narrated, and the person's residential jurisdiction point of contact (POC) notified.

I. Application Compliance

All actions that impact application compliance positively or negatively are directly linked to the Case Manager who worked on the case irrespective of where the customer resides.

13. Additional Guidance

A. A SPM FAQ is available on Knowledge Base.

B. All warm handoffs or notifications between counties must be by email. Anyone can send the email; however, the email is addressed to the point of contact in the home or assigned jurisdiction.

1) The following people must be carbon-copied on the email:

- a) The Local Operations SPM Supervisor for the region.
- b) The supervisor of the staff sending the email.

2) The Subject must read one of the following:

- a) Warm Hand-Off Case ID #
- b) Work Order Case ID #
- c) Appeals Case ID #
- d) Notification Case ID #

3) The body of the email:

Good day, (POC)

Please review the following.

- a) Copy and paste narration (The narration must clearly state what actions have been taken and what is outstanding).
- b) Indicate if follow-up is needed.

- 4) If the point of contact in the jurisdiction does not take any action within 24 hours of receipt the SPM Supervisor will follow up and escalate as needed.
- C. Case transfers are not required in SPM. The case remains in the residential jurisdiction in E&E when it is assigned elsewhere. Therefore, any request for additional verifications will be mailed to the customer's home jurisdiction.

14. Tasks

These are Work Items assigned to Case Managers from the E&E Worker Portal Dashboard. In this section, four main tasks are outlined, they are applications, redeterminations, alerts, and interim changes.

14.1. Applications

14.1.1. Customers

- A. Submit applications.
 - 1) Customers have several ways to apply for benefits. Customers can apply for all programs (SNAP, TCA, PAA, TDAP, EA, and Non-MAGI MA programs).
 - a) Apply online: All customers may apply online at <https://mymdthink.maryland.gov/home>
 - b) Apply in person at a Local Department of Social Services (LDSS) Office.
 - c) Apply by fax, mail, or email to the LDSS.
- B. Complete an interview if it is required.
- C. Submit all outstanding required verifications.
- D. Cooperate with other eligibility requirements, if applicable.
- E. May be required to verify their identity if the customer is not previously known to the agency and there is no information available from our commonly used databases.
- F. Should have applied for a social security number for the household member that will receive benefits.
- G. Customers must be Maryland residents.
- H. Customers should provide any changes related to the applications.

The LDSS provides interpretation for non-English speaking customers.
The LDSS also provides accommodation for customers with disabilities.

14.1.2. Clerical or designated staff

- A. Register and upload all applications in E&E, including applications received in the LDSS Computer Lab, submitted through the Consumer Portal, or received as a paper application (DHR 9701, DHR 9702).
- B. Retrieve applications submitted by drop box, mail, fax, or email, at least twice daily.
- C. Log all applications not received via the Consumer Portal on an LDSS tracker.
- D. Scan and upload all verification submitted by customers daily.
- E. Date-stamp all incoming mail, applications, redeterminations, etc. daily.
- F. Narrate their actions in E&E.

14.1.3. Case Managers

Case Managers are expected to be Generalists who can handle several programs at a time: food and cash assistance and possibly other programs. Training Case Managers as Generalists allows jurisdictions to serve customers more efficiently because they can address all program applications. Generalists are competent with the different program rules.

Case Managers

- A. Receive work assignments daily.
- B. Screen all SNAP applications for Expedited SNAP on the date the application is received but no later than the next business day.
- C. Interviews: For tasks requiring interviews, interview customers or the authorized representative (unless an interview waiver is in place).
 - 1) The interview may be conducted in person or by telephone.
 - 2) If the customer applies in person or drops their application at the local DSS office, the best practice is to interview the customer on the same day while the customer is still in the office.
 - 3) The Case Manager must schedule an interview and issue the interview notice to the customer on the day of application or no later than the next business day.
 - 4) The Case Manager will schedule an interview within 10 days if the customer is unable to be interviewed on the same day they applied for benefits. If the application includes SNAP, schedule the interview to take place within 3 days to enable timely processing of XSNAP if applicable.
 - 5) The actual appointment date of the interview must be:
 - a) Within five calendar days of the application date for XSNAP and SNAP.
 - b) For applications that do not include SNAP, the actual appointment date will be scheduled within 10 calendar days.
 - c) For EAFC applications the actual appointment must be on the same day as the application date or as soon as possible but no later than 10 calendar days.
- D. Run the following clearances for all customers

Child Support	On dependent children under the age of 18 with an absent parent
eDRS	All household members over the age of 16

BEACON	All household members over the age of 16
SAVE	All applicable non-US Citizens
SOLQi	All household members
SVES/Prison Match	All household members over the age of 16
Work Number	All household members over the age of 16

- E. Narrate the result of the screening for Expedited SNAP. The narration will state if the customer was eligible or not for expedited SNAP.
- F. Confirm eligibility and change the designation of the Work Item from assigned to unassigned. The customer will no longer be associated with the assigned jurisdiction.
- G. Enter narration about every contact and event that affects a case (see general rules and reminders regarding narration on pages 16 and 17 of the SBP).
- H. Verification
 - 1) Determine eligibility on applications that include all mandatory verifications (ready to work) immediately or no later than 15 days of the application date.
 - 2) Generate a request for verifications (1052) through E&E and send it to the customer if additional verification is needed. Allow the customer 10 days to return the verification.
 - a) Additional comments on specific items like substance abuse screening, must be entered manually on the 1052 generated by E&E.
 - b) All mandatory fields must be marked “not verified” to enable a system-generated 1052.
 - c) If a mandatory verification is not provided within the 10-day due date, and the verification remains outstanding, on the 27th day, code the Administrative Information page with a Client Delay (CD) reason code.
 - d) When verifications are returned between day 31 and day 60, update the Program Request Screen with the dates the verifications were returned to the agency. Apply the steps listed in IM# 24-33 Application Processing Timeliness Rate and Corrective Action Plans.

- e) All pending applications that have outstanding verifications and have a client delay reason coded in the administrative field of the Worker Portal, will automatically be denied on day 60.
- I. Case Managers must change the interview status from scheduled to missed when a customer misses a scheduled interview. This action generates the Notice of Missed Interview (NOMI).

14.1.4. Supervisors

- A. Assign or reassign applications to Case Managers daily.
- B. Assign interview appointments to Case Managers.
- C. Manage and review the E&E reports in real time.
 - 1) Application Status Report
 - 2) Worker Jurisdiction Compliance Reports
 - 3) E&E Productivity Report
 - 4) SPM Dashboard
- D. Review case manager assignments to ensure staff has completed assignments.
- E. Perform pre-review of case managers' cases for errors monthly.
- F. Monitor assigned applications to Case Managers for completion.

14.2. Redeterminations

14.2.1. Customers

- A. Complete and return signed redeterminations, or Maryland Benefit Review Forms (SNAP only).
- B. Return all documentation needed to determine eligibility.
- C. Complete an interview once every 12 months (redetermination application).
- D. Complete a redetermination application and submit it via the E&E Consumer Portal, or return a Redetermination packet by mail, fax or drop off at the local department.
- E. Redetermination signature pages will be returned to customers for signature if the Redetermination is not signed.

14.2.2. Clerical or designated staff

- A. Check drop-boxes, faxes, emails, and mail for redetermination packets twice daily.
- B. Log all redeterminations not received via the Consumer Portal on a LDSS tracker.
- C. Retrieve and date stamp all redetermination packets.
- D. Scan and upload all packets in E&E.
- E. Narrate the receipt of each packet in E&E.
- F. Initiated Maryland Benefit Review Forms in E&E.
- G. Redetermination Applications will be initiated by Clerical Staff/designated staff in E&E.

14.2.3. Case Managers

- A. Receive redetermination assignments daily.
- B. Review all applications.
- C. Complete all interviews.
- D. Run all clearances.
- E. Address all changes reported.
- F. Request all verification not provided.
- G. Update all verification provided.
- H. Narrate all actions taken on a case.

14.2.4. Supervisors

- A. Assign or reassign redetermination to Case Managers daily.
- B. Assign interview appointments to Case Managers.

- C. Assign rescheduled appointments to Case Managers.
- D. Assign Maryland Benefit Review Forms to staff Case Managers
- E. Review staff assignments to ensure staff follows all guidelines.
- F. Monitor assigned redeterminations to Case Managers for completion.

14.3. Alerts

14.3.1. Customers

- A. Mail documentation (PARIS Matches or New Hires) to report new income.
- B. Have 10 days to return verifications.
- C. Drop off, mail, or upload verifications.

990	National Directory New Hires
992	National Directory New Hires
993	Public Assistance Reporting Information System (PARIS) /Interstate Match
994	PARIS/Veteran Affairs (VA) Match
995	PARIS/FEDERAL Match
Prison Match	i.e., SSA, or OIG
Death Match	

14.3.2. Case Managers

- A. Receive PARIS and New Hires Match assignments daily.
- B. Attempt to independently verify any match information from a secondary source such as clearances (i.e., BEACON, Work number, SVES, etc.) and require verification from the customer only if the information is not validated by a secondary source.
- C. Review and enter income into E&E.
- D. Disposition the New Hire Alerts in the E&E system during applications and recertifications.
- E. Update the case with income, Federal ID Number, and disposition of the New Hire Alert.
- F. If a mandatory verification is required from the customer to address the New Hire Alert, and it is not returned within the allotted time the case can be denied for failure to return verification. For customers with simplified reporting requirements, denial can only occur during an application or redetermination.

14.3.3. Supervisor

- A. Assign or reassign the Alerts to Case Managers daily.
- B. Follow up on Alerts and the 1052's sent to customers for additional information.
- C. Ensure all Alerts are dispositioned in the system.
- D. Monitor assigned alerts to Case Managers for completion.

14.4. Interim Changes

14.4.1. Customers

- A. Submit a change by [https://mymdthink.maryland.gov/home/#/Consumer Portal Submission](https://mymdthink.maryland.gov/home/#/ConsumerPortalSubmission).
- B. Complete and submit a DHR 491 Form or signed written statement.
 - 1) May drop off, mail, email, or fax all changes to LDSS.
- C. Report changes in household composition, shelter expenses, and/or income.

14.4.2. Clerical or designated staff

- A. Check the office drop box, mail, fax, or email, for change forms twice daily.
- B. Apply a date stamp on all change forms received.
- C. Log all change forms not received via the Consumer Portal on an LDSS tracker.
- D. Scan, upload, and narrate in E&E daily all DHR 491 change forms or written statements about a change in the household, received in the office by mail, drop box, email, and fax.

14.4.3. Case Managers

- A. Receive Interim Change assignments daily.
- B. Review 491 for completion, Staff will check ECM for verifications, The Work Number, and BEACON for proof of income.
- C. Complete changes if a customer provides the appropriate verification.
- D. Request verification(s) needed to process the change If the verifications are missing.
- E. Allow the customers ten (10) days to return the requested information.
- F. Narrate all changes in the E&E System.
- G. Upload any or all changes reported at the interview or interaction with the customer.

14.4.4. Supervisors

- A. Assign or reassign Interim Changes to Case Managers daily.
- B. Review and monitor all changes reported to the agency.
- C. The Clerical Supervisor will ensure all interim changes are date-stamped and scanned into the E&E system.
- D. Monitor assigned interim changes to Case Managers for completion.

15. Mandatory Verifications by Program

Customers must provide proof of all household income (earned and unearned) for all programs (except for Expedited SNAP).

- A. Emergency Assistance to Families with Children
 - Proof of emergency.
- B. Medical Assistance
 - Citizenship
 - Asset verification
- C. Supplemental Nutrition Assistance Program
 - Expedited SNAP
 - Identity
 - Regular SNAP
 - Federally verified Social Security numbers
 - Earned and unearned income
 - For qualified immigrants- permanent resident card, I-134.
 - The following verifications are not mandatory, but a 1052 should be issued. Do not keep cases pending beyond 30 days if they are not received. The customer will not receive deductions until they are provided, after which these can be addressed as interim changes:
 - Shelter expenses,
 - proof of childcare,
 - proof of court-ordered child support payment, and
 - proof of medical expenses for disabled and/or elderly household members.
- D. Temporary Cash Assistance (TCA)
 - Completed Child Support Application,

- Compliance with Substance Use Disorder Screening, and
- Referral to the Work Program.

E. Temporary Disability (TDAP)

TDAP 1

- Completed 500 form verifying a disability for at least 3 months but less than 12 months and will not result in death.
- Customers can only receive TDAP 1 for 9 months in a 36-month period.
- Provide proof of assets.

TDAP 2

TDAP 2 applicants must also apply or have a pending SSI claim and sign a 340 form.

- Completed 500 form verifying a disability for 12 months or more (or less than 12 months if the disability will result in death).
- Provide proof of assets.

16. Type of Verifications Needed

Shelter	Lease and proof of payment, Mortgage Statement, Landlord Statement
Income	2 bi-weekly pay stubs, 4 weekly pay stubs, Employer Statement/Wage Form, Collateral Contact, Tax Return including Schedule C, New Business- last three months of gross receipts
Utilities Bill	Vendor Statements, Utility Bills, Phone Bills, Receipts
Household Demographics	Birth Certificate, Social Security Card
Collateral Contact	A statement

17. General Rules and Reminders Regarding Narration

Any action taken on a case must be narrated by the staff or case manager responsible. For additional detail, see DRAFT-IM_ 22- Information Memo Narration Guide

- A. Enter narration about every contact and event that affects a case including but not limited to:
 - 1) Individual appointments.
 - 2) Phone calls.
 - 3) Applications received.
 - 4) Interim changes.
 - 5) Verifications are uploaded into E&E for specific household members.
 - 6) Documentation and verification requested and received.
 - 7) Actions taken.
 - 8) Appeals received.
 - 9) Fraud reports.
 - 10) Redeterminations.
 - 11) Work Program.
- B. Use clear and concise language.
- C. Use only standard abbreviations.
- D. Record information in paragraph form.
- E. Record only facts NOT opinions.
- F. Record pertinent facts to provide the following information:
 - 1) Detail the type of contact (individual appointment, phone, etc.)
 - 2) Who was involved?
 - 3) Who needs assistance?
 - 4) Specific problems or issues needing resolution.
 - 5) Information that was provided
 - 6) Was there any expense or income mentioned?
 - 7) What information was requested? if non-mandatory, the reasons why the information was requested.
 - 8) Decisions made.
 - 9) Facts relied on to justify actions.
 - 10) What are the expected outcomes from the action?
 - 11) Pertinent timelines if any.
 - 12) Processing delays and facts that justify the delay.
 - 13) Include alerts to follow up on deadlines.
 - 14) The date information is due, and what action needs to be taken if the material is not provided by the due date.
- G. Record clear and sufficient facts to support all case actions or decisions.
- H. Cite responsibility for errors to agencies, NOT to individuals.
- I. Provide facts or verifications that support all corrections of errors.

- J. Always cross-reference case identification numbers when there are two different heads of households, but they have mutual household members.
 - 1) Note: *Failure to list an additional case I.D. may result in important information not being considered.* Example: a SNAP household with an associated TDAP or MA case household member.

References

1. Food Stamp Manual, TCA Manual, TDAP Manual,
<https://kb.dhs.maryland.gov/family-investment-administration/manuals>
2. Medical Assistance Manual,
<https://health.maryland.gov/mmcp/Pages/MedicaidManual.aspx>
3. 19-10 AT 45-day Application Processing
4. 21-06 IM 60-day Normal Processing Supplemental Nutrition Assistance Program (SNAP) benefits
5. 22-07 IM Application Processing Timelines
6. 22-25 Action transmittal, Benefits Review Form Process
7. 24-07 AT Proper Handling of Case Documents/Records
8. 24-33 IM Application Processing Timeliness Rate and Corrective Action Plan

Table 1: SBP Quick Reference

Action Required	SNAP	Expedited SNAP	TCA	TDAP	MA (NON-MAGI)
Register Application	Register all cases in E&E Same day, no later than the next business day				
Schedule Appointments	within 3 days	within 3 days	within 10 days	within 10 days	N/A
Interviews	Customers must be interviewed.				
Notice of Missed Interviews (NOMI)	The customer failed to appear for a scheduled interview.				N/A
Timeliness/Timeline	The customer must have access to approved benefits by day 30	The customer must have access to approved benefits by day 7	30 days	30 days	45 days
Narration	All actions must be narrated in E&E.				
Clearance Screens Needed	All household members 16 years of age and older				
Verification Needed	Social Security Number, Birth Certificate, Shelter Cost, Income.	Identity	Blood relative, all income verification	500 Medical forms, Proof of a pending application for SSI,	All household income, all medical bills, AVS - Asset Verification System