

5. RECEPTION OBSERVATION CHECKLIST (OPTIONAL)

Observation	Yes/No	Notes
GENERAL		
Is there central “first stop” area?		
Is there automated check-in (e.g. Q-matic)?		
For what activities? (scheduled interviews, application, change report, customer service, EBT, other services)		
Is waiting time tracked? (manual, automated)		
Is traffic volume tracked?		
Is traffic pattern tracked?		
Are peak and off-peak staffed?		
Are all areas open during office hours?		
Are staff cross-trained to cover multiple areas?		
Does coverage move between areas based on need?		
What happens at the end of the day if people walk in 5 minutes before closing?		
APPLICATION		
Is there designated area for applying?		
On-line capability?		
How many terminals?		
Help available? (Monitoring or actually doing)		
Are apps printed?		
Are there paper applications visible?		
Can applications be printed for completion later?		
Who screens?		
Where is screening done?		
Do you see any same day interviewing?		
Who does interviewing?		
What is closing time for applying?		
What is closing time for screening?		
VERIFICATION		
Designated area? Hand in only?		
Self-help?		
Help if needed?		

Observation	Yes/No	Notes
Hand in or transmit?		
Can customer fax docs themselves to doc imaging center?		
Is imaging done for the customer?		
Receipts?		
CHANGE REPORTING		
Who receives info?		
Designated area to make report? (example client reports changes to Regional Change Center via designated phone cubicles, other states changes can be reported on-line)		
Verification request form provided?		
CUSTOMER SERVICE		
Designated staff? (can be receptionists, for example, in Milwaukee there are several lines after reception for customer service inquiries)		
Are staff clerical or casework level? (Identifying if staff are empowered to fix problem rather than just research)		
Are problems being resolved same day? (In Indiana a lot of times case is just awaiting authorization after being handed off by non-State worker, we understand State of Washington, some Ohio counties and other states use workers in customer service)		
Are complaints/inquiries tracked for resolution? (Note timeframe, if any)		
Is there a summary report of complaints and inquiries? (Look to identify opportunity for analysis for program or process improvement efforts)		
EBT		
Is there designated area for issuance? Some states may do just mail and thus there will not be an area.		
Is there dedicated staff?		
Hours of service?		
Do they require more than one ID to pick up the card?		
OTHER SERVICES		
What services? (e.g., hearings, job fair, group orientation for SNAP E&T or TANF)?		

Observation	Yes/No	Notes
Are there designated areas for these clients to go?		
APPOINTMENTS		
Does reception have daily schedule?		
How are workers notified? Round robin or designated worker?		
How is wait time tracked?		
How are no shows tracked?		
Is there any “too early” or “too late” restrictions? (e.g., Milwaukee you cannot register on Q-matic as present for appointment too early)		
Are clients “too late” rescheduled?		
How called? (Example by Name/Number/Other, Q-matic may allow for numbers rather than names)		
GENERAL COMMENTS		

Observation	Yes/No	Notes