OFFICE OF POLICY, PROCEDURES, AND TRAINING

James K. Whelan, Executive Deputy Commissioner

Stephen Fisher, Assistant Deputy Commissioner
Office of Procedures

Human Resources Administration Department of

Social Services

POLICY BULLETIN #17-02-OPE

(This Policy Bulletin Replaces PB #16-44-OPE)

RANDOM MOMENT STUDY

Date:	Subtopic(s):				
January 4, 2017	Random Moment Study				
☐ This procedure can now be accessed on the FIAweb.	Revisions to the Original Policy Bulletin:				
	This policy bulletin is being revised to:				
	 Inform staff that beginning on January 3rd, 2017, the New York State (NYS) Office of Temporary and Disability Assistance (OTDA) will begin utilizing email as the initial method of communication for the Random Moment Study (RMS). Provide information on the RMS email, how to complete the online RMS, and how to add the RMS email address to your contacts list. Provide screenshots of the RMS questions (Attachment A), and answers to Frequently Asked Questions about the RMS study (Attachment B). Ensure that staff review their email at least twice a day (in the morning, and in the evening before they leave for the day), and set up out-of-office alerts in Outlook for any extended leave (i.e., vacation, medical, or any other leave expected to last longer than one day). 				
	Purpose:				
	The purpose of this policy bulletin is to inform all Job Center staff of changes to the Random Moment Study. This policy bulletin is informational for all other staff.				
	RMS was implemented in New York City on January 2 nd , 1992. RMS is a survey conducted by OTDA to identify the case activity in which frontline staff and eligibility staff are engaged in at that moment in time. RMS is an efficient way for OTDA to allocate administrative costs to the appropriate assistance programs. The collected data is				

HAVE QUESTIONS ABOUT THIS PROCEDURE? Call 718-557-1313 then press 3 at the prompt followed by 1 or send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298 used to determine federal and state reimbursement for performing specific case-related activities across multiple programs, such as Emergency Assistance to Families (EAF), Family Assistance (FA), Medical Assistance (MA), Supplemental Nutrition Assistance Program (SNAP), Safety Net (SN), Emergency Assistance to Adults (EAA), etc.

New Information

Beginning on January 3rd, 2017, OTDA staff will begin utilizing email as the initial method of communication for RMS. Previously, OTDA staff made random telephone calls to eligibility staff members who service applicants/participants in certain sections of the Job Center. Eligibility staff members will now be notified to take a RMS study by email.

Staff members who may receive a RMS email include, but are not limited to:

- Job Opportunity Specialists (JOS);
- Associate Job Opportunity Specialists (AJOS I); and
- Supervisors who spend at least 50% of their time with applicants/participants.

When a RMS email is received, eligibility staff members will have up to three calendar days to respond. However, if a response is not received after the first day, OTDA staff will follow-up by telephone. The RMS email link is only valid for three days. If the RMS study is not completed during that time period, staff members will receive a telephone call to complete the study. Staff members may also receive an additional follow-up telephone call if more information is needed.

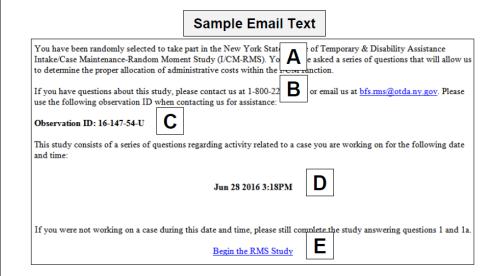
Eligibility staff members may receive a RMS email more than once; it is a daily random selection. Staff members must <u>not</u> forward the email to coworkers; only the staff member receiving the email completes the study.

New Information

The RMS email will include the following information:

- A. Introductory text.
- B. Contact information for questions/assistance.
- C. The Observation ID (used if staff members have any questions or need assistance).
- D. The specific date and time the study is for.
- E. A unique hyperlink to the study.

A sample RMS email is shown below:



Once a RMS email is received, staff members should read the email and make note of the date and time the study is questioning. Answers must be in response to the specific date and time listed in the email.

New Information

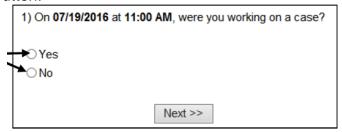
Completing the RMS Study

To complete the RMS study, follow the steps below:

- 1. Open the email received.
- 2. Click the Begin the RMS Study link.
- 3. The browser will open to the first page of the study.
- 4. Review the information on the screen, verify the date and time the study is questioning, and click the **Begin the RMS Study**Begin the RMS Study

button to begin the study.

 The study begins by asking if you were working on a case at a specific date and time. Respond by clicking the **Yes** or **No** radio button.



- 6. Click the **Next** button.
- 7. The next screens are determined by the answers you provided on the previous screen. Continue to respond to the study questions by selecting the answers and clicking the

 Next or Back buttons as needed. Do not use the browser forward and backward buttons.
- 8. The last screen of the study includes a summary table of your study answers. Please review this information. To change an answer, click the **Edit** link in the first column of the table. Once you are satisfied that all answers are accurate, complete the study by clicking the **Submit** button.
- 9. A **Thank you** confirmation opens confirming that the study has been submitted. Exit the study by closing the browser window using the **X** button in the upper-right corner

Refer to Attachment A

Please refer to **Attachment A** for the RMS study questions. Staff members may be asked about specific case-related activities being performed. Questions may include, but are not limited to:

- Are you working on a case?
- What is the case number you are working on?
- What type of case are you working on?
 - Ex: Not determined, Family Assistance (FA), Safety Net, Emergency Assistance for Adults (EAA), Emergency Assistance to Needy Families (EAF), etc.
- What transaction type is associated with the Case Number?
 - Ex: Application/new certification, recertification, etc.
- What specific activity were you involved with for the Case Number?
 - Ex: Screening, interview prep/interviewing, child care administration, case processing, etc.
- What program(s) were benefitted by the activity?
- Are you working on an employment related activity?

When a staff member is working on an employment related activity, it is imperative to make this known to OTDA staff. For example, a staff member who is currently working on budgeting earned income on a case, but will need to process an **FIA3A** in NYCWAY, can consider this an employment related activity, and should be stated as such to OTDA staff. Allocating employment related activities costs in the Job Center is a major purpose of the RMS. Therefore, it is important that

staff indicate employment if they are working on an activity that is employment related.

Examples of employment related activities include, but are not limited to:

- Completing the Employment and Disability Determinations checklist;
- Completing the Employment Plan;
- Determining barriers for employment;
- Monitoring attendance in work activities;
- Arranging for job training or education;
- Arranging or providing transportation benefits;
- Arranging for a disability assessment;
- Making a job referral;
- Arranging for child care;
- Data entry into the New York City Work, Accountability, and You (NYCWAY), Welfare Management System (WMS), Paperless Office System (POS), or Automated Child Care Information System (ACCIS); and
- Initiating employment related conciliation for failure to comply with employment requirements.

Staff is required to be cooperative and to answer any questions as best as possible. RMS is not concerned about a staff member's productivity or anyone personally. The issue is financial reimbursement to New York City, based on the type of case being worked on by the staff member at that moment.

Refer to Attachment B

Please refer to **Attachment B** for answers to Frequently Asked Questions regarding the RMS study.

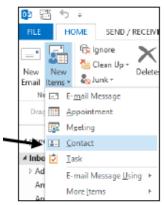
New Information

Add the RMS email Address to Your Contacts List

To ensure that RMS study emails are not sent to the Junk Email folder, staff must add the following email address (bfs.RMS@otda.ny.gov) as a contact in his/her contacts list. This will ensure that all future emails go to the Inbox.

To add a contact in Outlook, follow the steps below:

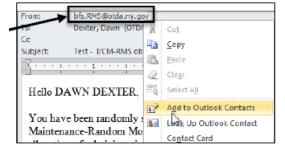
 From the Inbox, on the Home tab, access the New group, then click New Items and select Contact. A new untitled contact form opens.



- 2. In the Full Name field, type OTDA RMS.
- 3. Click the **E-mail** field and enter bfs.RMS@otda.ny.gov.
- On the Contact tab, in the Actions group, click Save & Close.

If staff already have a RMS study email, follow the steps below to add a contact in Outlook:

- 1. Open the email.
- 2. Right-click the sender's name and select **Add to Outlook Contacts**.



RMS Liaison Responsibilities Each Job Center RMS Liaison must:

- Maintain the RMS staff roster, by updating any personnel, emails, phone numbers, and site location changes.
 - The RMS staff roster should be updated to reflect staff re-assignments from one unit to another, as well as any new telephone numbers. RMS rosters should also be

updated to reflect any new telephone numbers when there is a move (site relocation).

- Ensure the RMS staff roster includes the appropriate staff members.
 - The following staff members should <u>not</u> be included on the roster – Center Management, Administrative Assistants, Clerical Associates, Fair Hearing, Homelessness Diversion, Training, and Disbursements & Collections (D&C) staff.
- Forward the updated RMS staff roster to OTDA by the 30th day of each month, or when there is a change. In some instances, the RMS staff roster may be needed to coincide with a move or change in telephone system/numbers that is, in effect, outside of the regular submission dates.
 - Refer to Attachment C for the OTDA RMS contact person for each respective Center.
- Work with Supervisors, Telephone Audit Liaisons, and Center Management/Designee regarding long-term absences or staff re-assignments to ensure that telephone lines are covered, messages are retrieved, and return calls are made timely.
 - Supervisors should ensure that staff review their email at least twice a day (in the morning, and in the evening before they leave for the day).
 - Out-of-office alerts should be set up in Outlook for any extended leave (i.e., vacation, medical, or any other leave expected to last longer than one day).
- Report any internet, email, and telephone outages lasting longer than 24 hours to OTDA.
 - Refer to Attachment C for the OTDA RMS contact person for each respective Center.

Telephone Outage

New Information

Refer to PB #15-116-SYS In the event of a telephone outage that affects RMS, the Center Director or Designee for the affected Site is to contact the MIS Help Desk by dialing **(718) 557-1313**, Option 1 from the Main Menu.

Effective January 3, 2017

References:

New York State Fiscal Reference Manual, Volume 3, Chapter 22

Related Items:

PB #15-116-SYS

Attachments:

Attachment A Random Moment Study Questions

Attachment B Random Moment Study – Frequently Asked

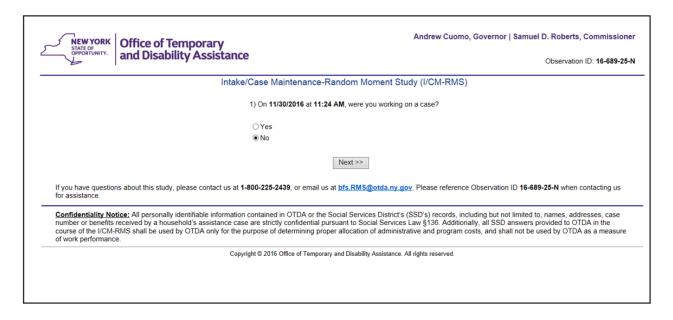
Questions

Attachment C Random Moment Study Point of Contact

Random Moment Study Questions

Question 1

On (Date) at (Time), were you working on a case?



Click on the Yes or No radio button.

• If **Yes** is selected, the JOS/Worker will be asked to provide a case number on the next screen. Continue on to question 2.

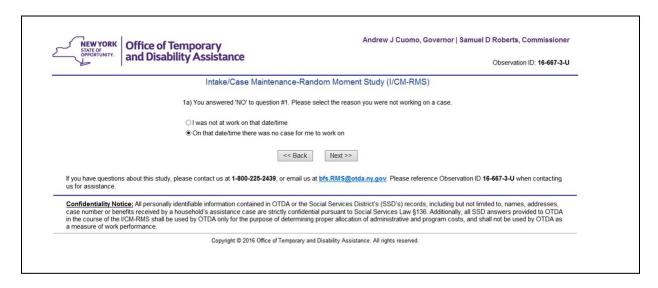
Note: When completing the RMS study, only case numbers should be entered. Do <u>not</u> enter a Social Security Number (SSN), Registration Number, or Application Number.

If no case number was assigned at the date and time specified, select the "No case number" checkbox. OTDA staff will call the following business day to gather more information about the case.

• If **No** is selected, continue on to question 1a.

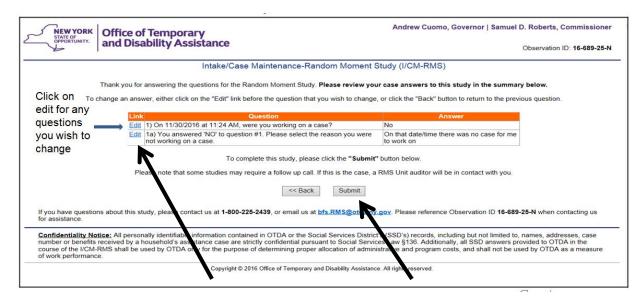
Question 1a

You answered 'NO' to question #1. Please select the reason you were not working on a case.



Select the appropriate radio button, and click "Next".

The following screen shows a summary of your answers. Please review your answers and verify that they are correct.

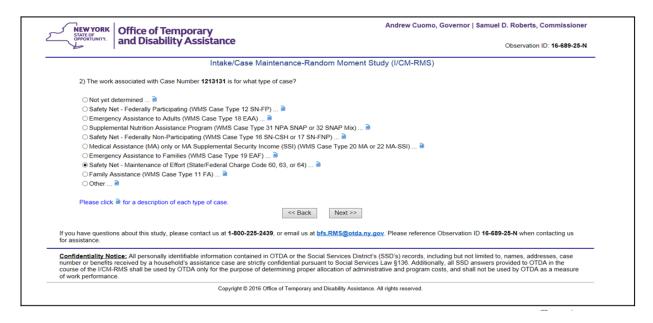


To change an answer, click the **Edit** link in the first column of the table. Make any changes needed.

Once you are satisfied that all answers are accurate, complete the study by clicking the **Submit** button. Once a study is submitted, the JOS/Worker can no longer access it.

Question 2

The work associated with Case Number (**X**) is for what type of case?



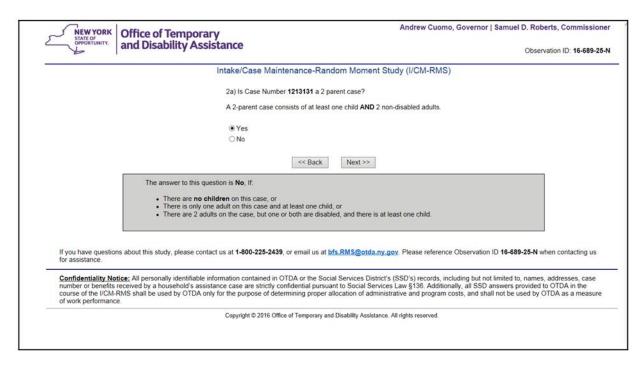
Select the appropriate radio button, and continue on to question 2a.

Note: Staff members can click the icon () next to each case type for additional information.

Question 2a

Is Case Number (**X**) a 2 parent case?

A 2-parent case consists of at least one child **AND** 2 non-disabled adults.

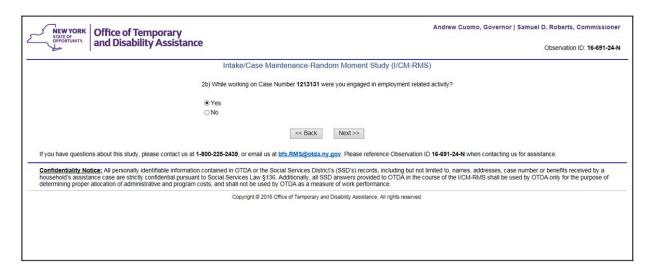


Refer to the gray box for additional information regarding a two parent household.

Click on the Yes or No radio button, and continue on to question 2b.

Question 2b

While working on Case Number (X), were you engaged in employment related activity?



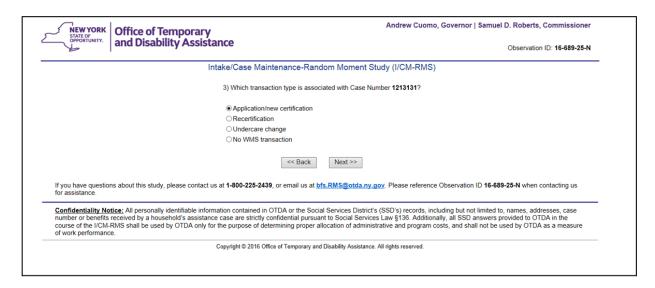
Click on the **Yes** or **No** radio button.

- If **Yes** is selected, the study will jump to question 6, which asks the JOS/Worker to select the specific employment activity related to the case. Refer to question 6.
- If **No** is selected, continue on to question 3.

ATTACHMENT A

Question 3

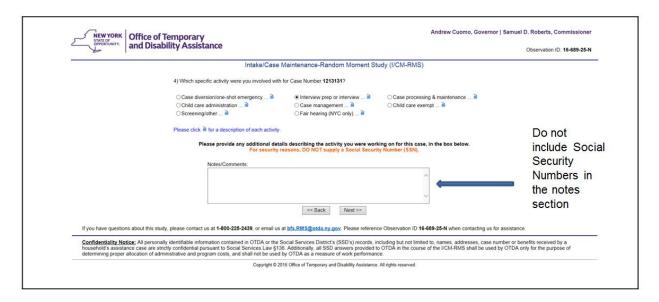
Which transaction type is associated with Case Number (X)?



Select the appropriate radio button, and continue on to question 4.

Question 4

What specific activity were you involved with for Case Number (X)?



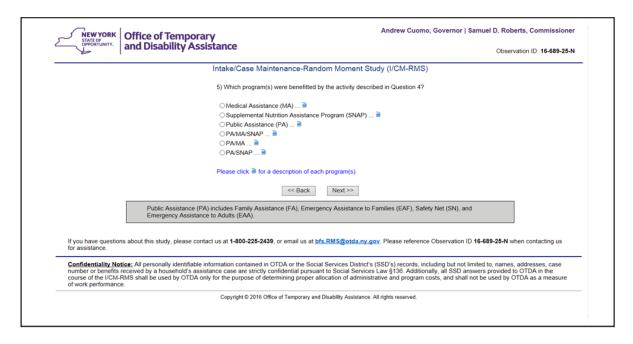
Select the appropriate radio button.

The JOS/Worker should provide notes in the Comments Box to explain the action being taken on the case (i.e., issuing a rent arrears check). Continue on to question 5.

Note: Do not include a SSN in the notes section.

Question 5

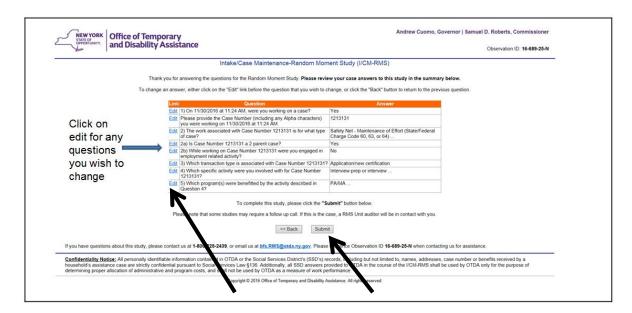
Which program(s) were benefitted by the activity described in Question 4?



Select the appropriate radio button. For example, if the JOS/Worker was issuing a rent arrears check, he/she would click on the Public Assistance (PA) only button.

Click "Next" to go to the last screen of the study, where a summary table of your study answers is displayed.

Summary Table



ATTACHMENT A

Please review your answers and verify that they are correct. To change an answer, click the **Edit** link in the first column of the table. Make any changes needed.

Once you are satisfied that all answers are accurate, complete the study by clicking the **Submit** button. Once a study is submitted, the JOS/Worker can no longer access it.

Confirmation Screen

Below is the confirmation screen after clicking on the **Submit** button. You have now completed the RMS study.



Andrew Cuomo, Governor | Samuel D. Roberts, Commissioner

Observation ID: 16-682-4-N

Intake/Case Maintenance-Random Moment Study (I/CM-RMS)

Thank you for completing the Random Moment Study. This confirms that your answers have been submitted for Observation ID: 16-682-4-N.

You can now exit the study by closing your browser.

If you have questions about this study, please contact us at 1-800-225-2439, or email us at bfs.RMS@otda.ny.gov. Please reference Observation ID 16-682-4-N when contacting us for assistance.

Confidentiality Notice: All personally identifiable information contained in OTDA or the Social Services District's (SSD's) records, including but not limited to, names, addresses, case number or benefits received by a household's assistance case are strictly confidential pursuant to Social Services Law §136. Additionally, all SSD answers provided to OTDA in the course of the I/CMI-RMS shall be used by OTDA only for the purpose of determining proper allocation of administrative and program costs, and shall not be used by OTDA as a measure of work performance.

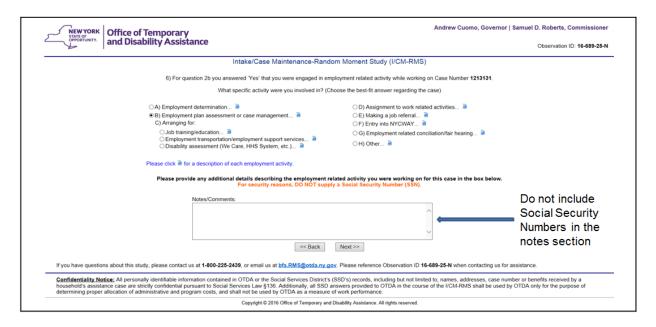
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ATTACHMENT A

Staff members working on an employment related activity for a case will be directed to question 6. Only those who respond **Yes** to question 2b will be directed to question 6.

Question 6

For Question 2b you answered 'Yes' that you were engaged in employment related activity while working on Case Number (X). What specific activity were you involved in?



Select the appropriate radio button. The JOS/Worker should provide notes in the Comments Box to explain what employment related activity they are working on. Do not include a SSN in the notes.

Note: Staff members can click the icon () next to each employment activity for additional information.

Once the JOS/Worker clicks on Next, this will complete the study for employment related cases.

Random Moment Study – Frequently Asked Questions

Below are answers to some questions/issues that staff may have regarding the online RMS study.

A. Can I exit a RMS study before submission?

If you exit a study before submitting the RMS study, a browser message appears asking if you are sure you want to leave this page. Click **Stay on the page** to complete the study. If you do leave the page, you will need to start at the beginning to complete the study at a later time.

B. Why is my study link expired?

Study email links expire after three days. If you use a link to open a study that has expired, a screen will open with the message, **Your study is expired**. You will no longer be able to take this study online. This particular study would have been or will be done via telephone. Delete the email.

C. My study link says the study was already completed.

If you use a link to open a study that you already completed, a screen will open with the message, **Your study is completed**. Delete the email.

D. I am having trouble!

If staff members have any questions or problems with completing the study, he/she should not hesitate to contact the RMS Help Line. Each screen contains RMS contact information (phone number and email address). The RMS Help Line can be reached at **1-800-225-2439**, or by email bfs.RMS@otda.ny.gov. The **Observation ID** (listed in the email and on every survey page) should be provided when contacting OTDA.

In addition, there are explanatory notes throughout the study. If staff members are not sure what something refers to, he/she can click the page icon () to open a description window for further information.

E. I clicked on the hyperlink for the study, and it is not loading.

A communication issue may cause a slow response time. Close the study and try again later. If the issue persists, call the RMS help line at **1-800-225-2439** or email bfs.RMS@otda.ny.gov.

F. What can I do if I entered the wrong information?

If the study was not submitted and you are still in the browser, the last screen of the study includes a summary table of your study answers. To change an answer, click the **Edit** link in the first column of the table. Make any changes needed. Once you are satisfied that all answers are accurate, complete the study by clicking the **Submit** button.

If the online study was submitted, call the RMS help line at **1-800-225-2439** or email bfs.RMS@otda.ny.gov. When doing so, provide the Observation ID and explain what is wrong. The observation ID is listed in the original email (letter C below) and on every page of the online study screens.

	Sample Email Text	
You have been randomly selected to take pointake/Case Maintenance-Random Moment to determine the proper allocation of admin	: Study (I/CM-RMS). Yo 🗛 e ask	Cemporary & Disability Assistance ted a series of questions that will allow us on.
If you have questions about this study, plea use the following observation ID when con		mail us at <u>bfs.rms@otda.ny.gov</u> . Please
Observation ID: 16-147-54-U		
This study consists of a series of questions r and time:	regarding activity related to a case yo	u are working on for the following date
	Jun 28 2016 3:18PM	
If you were not working on a case during the	-	the study answering questions 1 and 1a.
	Begin the RMS Study	•

G. I was working on a case, but there isn't a case or link number yet.

Staff can still fill out the study. There is a checkbox to select when **no case (or link) number has been assigned on the date/time specified**. Simply mark that checkbox and finish the online study. OTDA staff will call the following business day to gather more information about the case.

H. Will my supervisor know if I received an emailed RMS study?

Yes, supervisors will be included as a cc on emailed studies.

I. What should I do if I was on vacation/not in the office on the date and time of the study?

Staff members should still complete the study. One of the first screens on the study asks if you were working on a case for the date and time of the study; you would select **No** and click **Next**. Do not exit the study without clicking the submit button; this will finalize the study.

J. Can a supervisor provide the information, if the JOS/Worker is unavailable?

Preferably, the JOS/Worker should complete his/her own study. However, if the JOS/Worker is out of the office, the supervisor may complete the study by selecting **No** to Question 1, and selecting the appropriate response for Question 1a. If the JOS/Worker is in the office, but temporarily unavailable, he/she has up to three days to complete the study.

RANDOM MOMENT STUDY (RMS) POINT OF CONTACT					
JOB CENTER	NAME	TELEPHONE NUMBER	EMAIL ADDRESS		
BROOKLYN/ STATEN ISLAND					
Coney Island #63	Tammi Kleinke	(518) 408-4964	tammi.Kleinke@otda.ny.gov		
DeKalb #64	Tammi Kleinke	(518) 408-4964	tammi.Kleinke@otda.ny.gov		
Bushwick #66	Tammi Kleinke	(518) 408-4964	tammi.Kleinke@otda.ny.gov		
Clinton Hill #67	Tammi Kleinke	(518) 408-4964	tammi.Kleinke@otda.ny.gov		
South Brooklyn #70	Dawn Latimer	(518) 408-4966	dawn.latimer@otda.ny.gov		
Richmond #99	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
BRONX/FSCC/QUEENS					
FSCC #17	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
FSCC #17 Brooklyn	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
FSCC #17 Bronx	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
FSCC #17 Manhattan	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
FSCC #17 Queens	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
Rider #38	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
Hunts Point #40	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
Fordham #44	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
Crotona #46	Tammi Kleinke	(518) 408-4964	tammi.Kleinke@otda.ny.gov		
Queens #53	Dawn Latimer	(518) 408-4966	dawn.latimer@otda.ny.gov		
Jamaica #54	Dawn Latimer	(518) 408-4966	dawn.latimer@otda.ny.gov		
Rockaway #79	Dawn Latimer	(518) 408-4966	dawn.latimer@otda.ny.gov		
SPECIAL NEEDS/ MANHATTAN					
St. Nicholas #18	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
East River #37	Tammi Kleinke	(518) 408-4964	tammi.Kleinke@otda.ny.gov		
Union Square Job Center #39	Dawn Latimer	(518) 408-4966	dawn.latimer@otda.ny.gov		
Residential Treatment Service Center #52	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov		
Waverly #13	Tammi Kleinke	(518) 408-4964	tammi.Kleinke@otda.ny.gov		
East End #23	Dawn Latimer	(518) 408-4966	dawn.latimer@otda.ny.gov		
Dyckman #35	Dawn Latimer	(518) 408-4966	dawn.latimer@otda.ny.gov		

ATTACHMENT C

SPECIAL POPULATIONS			
Refugee #47	David LaPoint	(518) 408-4965	david.lapoint@otda.ny.gov
Veterans #62 Special Projects Center #80	David LaPoint Deactivated	(518) 408-4965	david.lapoint@otda.ny.gov
Seniorworks #84 HVN/RAR #90	David LaPoint N/A	(518) 408-4965	david.lapoint@otda.ny.gov