Attachment F.2 Observation Guide

This information is being collected to assist the Food and Nutrition Service in better identifying and understanding how States define and measure customer service for SNAP applicants and participants. This is a voluntary collection and FNS will use the information to better understand current efforts to strengthen customer service practices in SNAP. This collection does not request any personally identifiable information under the Privacy Act of 1974. According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0584-[xxxx]. The time required to complete this information collection is estimated to average 0.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: U.S. Department of Agriculture, Food and Nutrition Service, Office of Policy Support, 1320 Braddock Place, 5th Floor, Alexandria, VA 22306 ATTN: PRA (0584-xxxx). Do not return the completed form to this address.

Instructions: Use this form when you are on a site visit. It includes observations of the waiting/reception room (if applicable) and eligibility worker tasks. Use a different form for each site visit you conduct.

Context and setting

State: Click or tap here to enter text.　　　　**Site name/type:** Click or tap here to enter text.

Site visitor: Click or tap here to enter text.　　　**Date:** Click or tap to enter a date.

Office location and accessibility (if applicable)

Does the building have a sign outside indicating the name of the office?

Click or tap here to enter text.

Are the operating hours listed on the building?

Click or tap here to enter text.

What type of neighborhood is the building located in?

☐ Business district or mainly business/retail　　　☐ Combination business/residential
☐ Mainly residential　　　　　　　　　　　　　　☐ Other: Click or tap here to enter text.

Is there a parking lot for applicants who drive to the office? Is it free of charge? Is disabled parking available?

Click or tap here to enter text.

Is there a bus or other public transit stop within a block of the office? Do buses or other transit options run multiple times an hour?

Click or tap here to enter text.

Is the building accessible for wheelchairs and people with limited mobility or strollers (e.g., ramp, elevators, etc.)?

Click or tap here to enter text.

Additional notable comments about the building location and accessibility:

Click or tap here to enter text.

Reception area (if applicable)

Are there signs at the entrance to the building directing applicants to the reception area? Are these displayed in multiple languages *(e.g., Spanish, Mandarin, Braille)*?
Click or tap here to enter text.

Which programs share a reception area? (e.g., SNAP, TANF, Medicaid, General Assistance, SSI, Child support enforcement, other)
Click or tap here to enter text.

Who are the staff in the reception area (e.g., are they eligibility workers, supervisors, assistants, triage workers, etc.)? What roles do they play?
Click or tap here to enter text.

Are any bilingual staff present? If so, what languages are they speaking? Have staff called or requested an interpreter on behalf of a customer? What languages have been most requested? Have any requests not been met?
Click or tap here to enter text.

Describe what happens when someone walks through the door. Where do they go first? Who do they talk to?
Click or tap here to enter text.

What process or technological tools are available to customers (e.g., self-service kiosk, triage eligibility worker, pamphlets about programs, television screens displaying relevant information, etc.)? Are these available in multiple languages (e.g., Spanish, Mandarin, Braille, ASL)?
Click or tap here to enter text.

Which applications are available to customers in the reception area? Are these displayed in multiple languages *(e.g., Spanish, Mandarin, Braille)*?
Click or tap here to enter text.

Are customers completing applications provided with a writing surface and/or pens?
Click or tap here to enter text.

Are customers completing applications provided with any assistance?
Click or tap here to enter text.

Additional notable comments about the reception area:
Click or tap here to enter text.

Reception area staff capacity

Instructions: Spend approximately 15 minutes observing the reception area/waiting room. If you are able, make another quick observation at a different time (for example, at lunchtime if the first observation was in the morning) in case customer flow or staff capacity varies throughout the day.

Observation Time: Click or tap here to enter text. to Click or tap here to enter text.

How many staff are managing the reception area?
☐ There is one staff person and a relief worker to cover breaks.

☐ There are generally Click or tap here to enter text. (# of staff people) managing the reception area.

☐ Other (specify): Click or tap here to enter text.

Are clients waiting for SNAP staff in the reception area?
☐ Yes.
☐ No.

About how many customers do staff see during your observation? Please note how long you spent observing.

Click or tap here to enter text. customers

Click or tap here to enter text. minutes spent observing

Do reception area staff take turns seeing customers? Do staff take breaks?
Click or tap here to enter text.

What resources do staff have available to them (e.g., ergonomic equipment, computers, bilingual staff, interpreters, etc.)?
Click or tap here to enter text.

Are there enough seats in the reception area?
☐ Yes
☐ No.
Is there enough room for wheelchairs, walkers, strollers, etc. to navigate?
☐ Yes
☐ No.
Additional notable comments (e.g., did you observe a customer-staff disagreement? Were staff receiving training or being evaluated, etc.):
Click or tap here to enter text.

Task observation

My name is <<name>> and I am from a company called SPR/Mathematica, a research and evaluation company based in Oakland, California/Princeton, New Jersey. We were hired by the Food and Nutrition Service at the U.S. Department of Agriculture to help conduct a study on Supplemental Nutrition Assistance Program (or SNAP) customer service strategies to understand how States design customer service improvement initiatives and how those initiatives are implemented. With your verbal consent, we would like to observe and record this task to learn more about how SNAP case management works in order to create research findings that can help improve customer service practices for future participants. The study is voluntary and the decision to participate in the study is up to you. There are no penalties if you chose not to participate. If you give your consent to participate, you can choose to stop participating at any time. All information that is collected about you through the observation will be kept private and will be used for research purposes only. Your name will never be used in any reports and no information will be reported in any way that can identify you. If you are uncomfortable at any time during the observation, please let me know and we can stop the observation.

Do you consent to have me observe you work?

<<If eligibility worker says no:>> Okay, thank you for your consideration. *[Site visitor should leave the meeting space and wait for the next eligibility worker to observe.]*

<<If eligibility worker says yes:>> Great, thank you!

I would like to record the observation so I don't miss anything. No one will hear the recording except for researchers. Is it okay with you if I record? If you want me to turn the recorder off for any reason or at any time, just say so.

<<If eligibility worker says no:>> Okay, thank you for your consideration. *[Continue to observe but do not turn on the recorder.]*

<<If eligibility worker says yes:>> Great, thank you! Do you have any questions? *[Turn on the recorder.]*

Setting for the task:
☐ In person ☐ Live web/video session (e.g., Zoom)
☐ By phone ☐ Other: Click or tap here to enter text.

Describe the setting (e.g., private office, cubicle, conference room, open space).
Click or tap here to enter text.

Is the setting appropriate for the nature of the task (e.g., sufficient privacy, quiet)? Why/why not?
Click or tap here to enter text.

Describe what tools or resources the eligibility worker is using (e.g., a computer, case notes, manuals). Do the materials seem adequate for the task (e.g., ergonomic equipment, old/new technology, easy to access)?
Click or tap here to enter text.

Are interpretation services offered? What service does the agency use for this, if any (e.g. Language Line)?
Click or tap here to enter text.

During the task

Is anyone present besides the eligibility worker? Is the eligibility worker collaborating with other staff?
Click or tap here to enter text.

Does the eligibility worker have opportunities to take breaks (e.g., for water, bathroom, lunch, stretching) when needed?
Click or tap here to enter text.

What task is the eligibility worker working on? (*Check all that apply*)
☐ Reviewing a new application
☐ Reviewing an existing case
☐ Troubleshooting a case with a customer
☐ Service planning
☐ Service plan review
☐ Participant reimbursement provision
☐ Referrals. Specify type: Click or tap here to enter text.
☐ Follow-up and retention services
☐ Other. Describe: _____

Are any specific case management tools or forms used? If yes, which ones and how are they used? How useful do they seem? How comfortable is the eligibility worker using them?
Click or tap here to enter text.

The following questions are for the eligibility worker as they work through their task:

Could you tell me more about the task you are currently working on? Probes below:
- How often do you work on this task?
- How long does it often take to complete?
- Does this task require you to look up policy to determine eligibility? If so, how long does that take?
- Does this task require communicating with the customer? What is that like?
- Does this task require collaborating with other staff within and outside of the agency? What is that like?

Click or tap here to enter text.

What tools or resources are you using to help you complete this task? Probes below:
- How often do you use these tools or resources?
- Are these tools or resources helpful to you? In what ways?
- Are there any workarounds you or colleagues have created to make the tools or resources more useful to you?
- Are there additional resources or supports that could help you do this better/better serve the customer?

Click or tap here to enter text.

If eligibility worker discusses task with a partner (either a colleague or outside partner, please specify which in the text):
- Which partner is the eligibility worker speaking with? What is the nature of the partnership?
- Does the eligibility worker have a close relationship with this partner? Do they work together often?

- What is the conversation about? What is the result?

Click or tap here to enter text.

<u>After the task</u>

If possible, have a short debrief with the eligibility worker after the task. Ask the eligibility worker about anything in the meeting you did not completely understand (e.g., unfamiliar acronyms, unclear procedures that were discussed). Then ask:
- What did you expect to happen during this task today?
- Did it meet your expectations?
- Was this a typical type of task? If not, what was different?
- [*If applicable*] Why was a virtual setting selected for the task?
- How long have you been working with this task/case?

Click or tap here to enter text.

<u>Additional notes</u>

Click or tap here to enter text.

Overall Questions

<u>Questions for site visitor after leaving the site:</u>

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- Overall, how comfortable did the eligibility workers seem with their role (technology, workspace, job responsibilities, interactions with coworkers, partners, or customers)?
- Did the eligibility workers spontaneously mention any problems or challenges they experience in their position (for example, lack of training, malfunctioning technology, old software, etc.)?
- What appeared to be the case workers' strengths in providing customer service? What about challenges?

Click or tap here to enter text.

[if any interactions with customers were observed, for example, in the reception area]

- Did it appear that customers had to wait a long time for assistance?
- How comfortable did staff seem during any observed interactions?
- What was their demeanor? Were they open, friendly, matter of fact, hurried, etc.?
- How prepared were staff to handle questions from customers? What were the things they excelled at and what were the questions that caught them by surprise?
- Did the interaction appear to resolve the customers' issues or did loose ends remain?
- Did the customers appear to have a clear understanding of the resolutions and any needed next steps? Did they appear satisfied with the service or assistance they received?

Click or tap here to enter text.

Additional notes

Click or tap here to enter text.