

**PWD&WRB TAP Advisory Committee  
March 26, 2018**

**Agenda**

1. TAP Preliminary Research and Usability Findings
2. Tenant to TAP Pilot
3. One Stop Shop Pilot for TAP applications (customers apply for PECO, PGW and TAP assistance at same time with same info) with Councilwoman Quinones-Sanchez team.
4. Partner Resources – what do our partners see as better support/resources that PWD can provide to enhance TAP application at NECs and partner centers (Feedback from your counselors/staff on what they are hearing about the application process)

## **PWD&WRB TAP Advisory Committee**

### **March 26, 2018**

### **Meeting Notes**

1. TAP Preliminary Research and Usability Findings: PWD will continue user testing; potentially ideal time would be in June when “refresher” workshops may be held for our partners. We also talked about the map created by UESF that is linked to on the City’s Water bill Customer Assistance website that refers customers to their closest assistance center. Sorry for the long URL. I’m sure there is a shortcut!

<https://lisa1113.carto.com/builder/3132355a-94ab-4963-87b3-8c41605c84bc/embed>

2. Tenant to TAP Pilot: We talked about a number of fact sheets that would be helpful for tenants and landlords about benefits of TAP. PWD will develop a fact sheet specifically for landlords and tenants, in addition to a fact sheet that addresses TAP and arrearages. CLS will provide a copy of their advice letter and some PowerPoint slides that address these topics. PWD will share drafts with the committee. Aiming for completion by April 20.
3. One Stop Shop Pilot for TAP applications (customers apply for PECO, PGW and TAP assistance at same time with same info) with Councilwoman Quinones-Sanchez team: Eric – we missed you at the meeting. Would you be able to assist with setting up a meeting with your team so we can talk about the logistics of these “One-Stop” workshops? We’d love to pilot this spring with your team’s assistance.
4. Partner Resources – what do our partners see as better support/resources that PWD can provide to enhance TAP application at NECs and partner centers (Feedback from your counselors/staff on what they are hearing about the application process: PWD would like to hear back from Advisory members about what additional resources we can provide to the NECs and other intake sites that can facilitate your counselors’ abilities to work with customers on TAP/Customer Assistance applications. We also talked about hosting another round of workshops for our partners’ intake teams in June. This may bring to light some add ’l assistance that we provide. Lastly, CLS also noted improvements that they would like to see re the application process. PWD will follow up on which improvements are already in the queue for the coming fiscal year:

- Downloadable application (no bar code)
- Ability for partners to find water access code when customers don't have their bills
- Education/ease of including cover sheet along with missing documents. Many customers lose the cover sheet
- Saving applications on line so that customers can return to complete
- Language access for all components of TAP (once a customer requests an application in another language, letters and other info to be provided in the same language)
- Turnaround time for applications – concern about the monthly (full) bill continuing at non-TAP rate up until TAP approval
- Arrearage forgiveness (not just penalties)

**PWD&WRB TAP Advisory Committee  
June 7, 2018**

**Agenda**

1. TAP Launch – A Year in Review. What challenges are your staff having when assisting customers with their TAP applications?
  - Water access code
  - Customer documentation
  - Staff confidence of knowledge of TAP
  - Ease of application
  - Partner instructions
  - Other
  
2. Water Access Code for Basis2 Form
  - Training
  
3. Landlord and Tenant Draft
  
4. Application Enhancements on the Horizon
  - Language access (The change here is to allow customers to have the ability to choose one of the 10 languages in that language. The front page of the website would then be translated to the language of choice. The options then would be to have an application mailed or print a PDF in the language of choice (no online application). Further correspondence at this time would still be in English. Spanish correspondence is mandated and therefore would be the first to have all correspondence in that language. However, we do not have a projected date of completion at this time) (August 2018)
  - Confirmation email (August 2018)
  - Ability to save application ( October 2018)
  - Error alerts when missing info on application (October 2018)
  
5. General Refresher Trainings (tie into above enhancements)?
  
6. Other items?



**TAP Advisory Committee  
Meeting Notes  
June 7, 2018**

1. Water Access Code for Partner Staff - Attaching again the revised, "short" form for your staff to fill out. Completed forms can be sent to Joanne and she will forward to the Basis2 (WRB Billing team). Once all the forms are in, a Basis2 rep will provide training to one or two people from each organization. They said it is pretty simple so shouldn't be a challenge for staff to train other colleagues.
  
2. Fact Sheets - we shared the draft Landlord and Tenant TAP fact sheets. Looking forward to your review and input and hoping to finalize by the end of June. We also talked about developing two new fact sheets:
  - UESF + TAP fact sheet to better outline how customers can be sent to UESF first if they have water debt \$3,000 or less
  - Important TAP facts, e.g., TAP applications need to be returned within 14 days if a customer has a pending shut off notice, otherwise a customer may take more time. We'll work with the TAP team to pull out a few more nuggets

PWD will take the first crack at these fact sheets and then share with you all for feedback.
  
3. TAP application enhancements will be phased in beginning in August and then through October. We will host another training session when these enhancements are on line.
  
4. The Benephilly team will send UESF their assistance centers that are not currently on the map that was developed by UESF to help guide customers to the closest neighborhood center with a pop up to show what services are offered.
  
5. We'd love to capture how many TAP applications your centers process. If you can provide these numbers for July 1, 2017 to the present, that would be great. If you have them monthly, even better but we will take what you can provide. Hoping to continue getting this info moving forward.
  
6. Please let us know how we can better support your centers in providing TAP assistance. Feel free to call or email any time.

**PWD&WRB TAP Advisory Committee  
July 26, 2017**

**Agenda**

1. Public Engagement Process

Tools include:

- Fact Sheets
- FAQ
- Posters
- Website
- Radio and Newspaper ads
- SEPTA Advertising
- Community meetings
- City Council constituent services
- Training workshops with partners and advisory committee members
- Press Conference

2. Ease of Application and Process – What are you Hearing

3. User Testing with Partners

**TAP Advisory Committee**  
**July 26, 2017**  
**Meeting Notes**

1. Feedback regarding public engagement and application process from partners:
  - Access code requirement makes it difficult for customers to apply when they seek assistance at a partner center. (They may write down their account number but don't realize they need their access code). Often customers do not have their water bills and do not know what the access code is. Wait times to call our hotlines are too long and can tie up a counselor while waiting for this info. *Do we need to highlight access code?*
  - Not everyone feels comfortable filling out or providing personal information for an online application. *That's okay though. Online is just one method to apply. Encourage people to request a printed application or print one out for the customer.*
  - Some partner offices have computer labs so that customers can use these computers to apply. *PWD would like to create a map with the assistance of our partners that locates all of the NECS, UESF and other client services offices. We can also note which offices have computer labs, assistance for all low income services (one stop shop) or other customer amenities*
  - How do we know which of our communication tools is effective? *Moving forward, PWD would like to begin asking customers how they heard about TAP via surveys, asking customers on the phone, etc. It would be great if our partners could ask too when serving customers.*
  - Our application only requires one document for proof of residency despite that Section 206.2 in the Regulations say. *That is correct.*
  - CLS hosts utility clinics and would like PWD/WRB to attend these clinics with the ability for customers to meet with a rep who can look up billing and other info on a laptop. *PWD will work to ensure that happens at the next clinic/forum.*
  - Partner client services staff want more training. *PWD would be happy to work with our partners to set up additional information sessions.*
  - Customers still have a lot of questions about the process, e.g., *When will I get the results from my application? What if I am about to be shut off? What about my back bill? Application was returned due to postage. PWD needs to ensure that our partners have the answers to share (FAQ, etc.). We are happy to develop add'l FAQs for your services staff.*

2. User Testing – we talked about ways to partner ensure that our messaging, marketing and application process is effective and accessible to customers. UESF expressed interested in working with PWD on the application process highlighted below as a start. We will be in touch! Open to other opportunities if partners have a preferred option.

a. Potential ways to identify candidates for Usability Testing

*All asks for time should include some form of incentive, for example gift card*

- Email to subscribers
- Request volunteers at community meetings
- Partners ask if individuals would be interested in participating in evaluation or feedback
- Call center asks random sampling of callers if they would like to participate in evaluation or survey.

b. Specific Areas of inquiry and possible methods

Area of Inquiry	Possible methods for audience feedback:
Call to action on next round ads (“Start Here” vs “Request An Application”)	<ul style="list-style-type: none"> <li>• Prompt email to subscribers with A/B test</li> <li>• Share drafts of ads with individuals, ask if one would make someone more or less likely to apply</li> </ul>
Barriers/difficulty to starting application process	<ul style="list-style-type: none"> <li>• Survey</li> <li>• Interviews.</li> </ul>
“Get Ready” Guidance: Order of 1,2,3 tips, Checklist language and tips, and “How to request an application” language	<ul style="list-style-type: none"> <li>• A/B test: Share draft fact sheet with customers, see how many of them successfully gather what they need and fill out application?</li> <li>• Send random sample of online customers to second version of Start Page? Track quantity of successful applications submitted</li> <li>• Share checklist with customers, ask them to make a highlight or note any place they are confused?</li> <li>• Summative Survey sent with letters asking for feedback on the ‘get ready’ guidance</li> </ul>
Application <i>(note: Although no changes to application intended at this time, we’d like to capture any feedback that would allow for future revision, or revision to current guidance)</i>	<ul style="list-style-type: none"> <li>• Observation of filling out application: ask participants to allow an observer/researcher how they fillout application online or paper.</li> <li>• Give participants a ‘feedback worksheet’ that matches the</li> </ul>

	applications steps. Ask participants to make notes at any section they found unclear or confusing
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c. Additional techniques to consider in general:

- Followup Survey included with response letters
- Partners and call centers make notes of questions rec'd in person or over the phone (we'd need a standard instrument that would work for each)

**TAP Advisory Committee**  
**September 10, 2018**  
**Agenda**

1. Revised Customer Assistance Program Application (timeline November implementation). Includes:
  - Social Security Number optional
  - OOPA Compliance (check box added)
  - Customer Responsibilities (remain the same due to original TAP Advisory Recommendations. Note that check boxes are optional.
  - Zero Income Form: remove first 4 questions (yes/no) but keep the free form question.
  - Update language on applications regarding time to return application vs. shut off
  
2. Application Queue
  - Currently no backlog
  - Senior Citizen mailing campaign – Nov. but may need a bit more time working with Behavioral Health scientists to identify most effective mailing
  - OOPA mailing to follow
  
3. Philadelphia Benefits Access Coalition – October 4
  
4. Partner Utility Fairs

**PWD&WRB TAP Advisory Committee  
November 2, 2017**

**Agenda**

Agenda

1. Review of sample assistance program approval letters and bills
2. Review of causes for incomplete applications and recommendations
3. PWD and partner user testing
4. Feedback from your counselors/staff on what they are hearing about the application process
5. Communications – what can we do better

**PWD&WRB TAP Advisory Committee  
November 2, 2017**

**Agenda**

Agenda

1. Review of sample assistance program approval letters and bills.
  - Susan Crosby reviewed the batch of approval letters with our CLS, UESF and ECA reps.
  - All questioned the reading level of the letters. We talked about the legal requirements for listing all programs. Our goal for the future will be to simplify where we can.
  - It was pointed out that the letters did not offer translation services. This tag line will be added.
  
2. Review of causes for incomplete applications and recommendations
  - See attached. Our goal for the user testing is to get at the root of the obstacles to completing an application. PWD also will be focusing on educational tools, e.g., videos, website update, working jointly with the NECS and other intake locations to ensure that our partner agencies have the info and resources they need to assist clients.
  - UESF and ECA shared an intake resource map (attached). PWD will create a user-friendly version for our call centers and the web
  
3. PWD and partner user testing
  - See attached
  
4. Feedback from your counselors/staff on what they are hearing about the application process
  - PWD's VISTA, Sam Boden, will be attending ECA's Nov. 9 Energy Conference to introduce himself to the NECs with the assistance of ECA. Goal is for Sam to regularly visit the NECs to ensure continual feedback on the TAP application process and to document areas of the process or outreach that can be improved.
  
5. Communications – what can we do better
  - See above

