

## Other Tools for Supporting the Bolsa Familia Decentralized Management

Decentralized management of the Unified Registry and the *Bolsa Familia* Program (BFP) at Brazil's different federative levels involves the Ministry of Social Development and Fight against Hunger (MDS) providing a range of management tools and information systems to the states and municipalities, as well as guidance to technical staff, municipal managers and state coordinators of the BFP. The main management tools and forms of communication are described below<sup>1</sup>.

### BFP MANAGEMENT SYSTEM (SIGBFP)

The *Bolsa Familia* Program Management System (SIGBFP) was developed to optimize and improve quality control and monitoring of the procedures used for managing BFP-related registration mechanisms, benefits and conditionalities. The SIGBFP also aims to enhance communication between the MDS and BFP managers and coordinators.

The SIGBFP is designed specifically for professionals who undertake BFP management activities in the states and municipalities. Other groups involved in the management process can also make use of this tool. These include oversight and social control bodies, as well as citizens and BFP beneficiaries seeking information on local management of the Program.

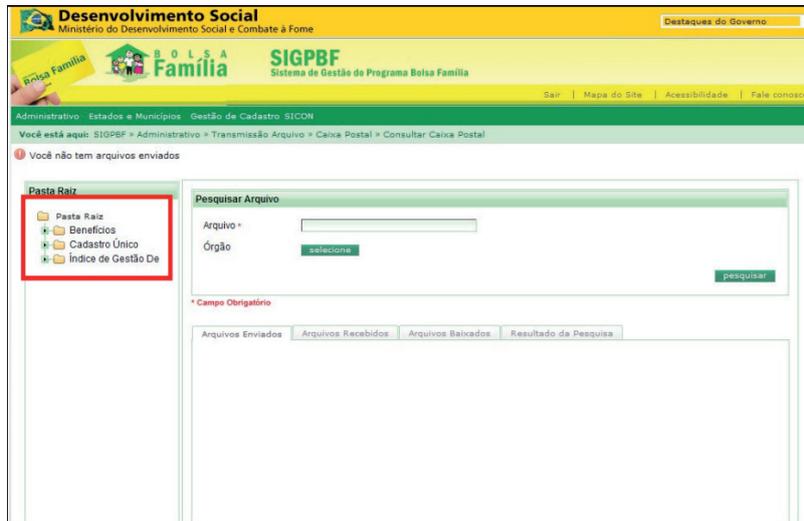
The SIGBFP can be accessed either freely or by special password. In the system's public area it is possible, for example, to access certain details of the local management structure of the Program, such as the address of the city hall, the mayor's name, and information about the agency and manager responsible for running the BFP and Unified Registry in the municipality. Information on social control bodies can also be accessed.

In the restricted password-only area, the system enables managers to carry out consultations, registrations, control and editing of data relating to municipal management, e.g. information on the city hall, the BFP manager and staff, and the social control bodies. **Controlled access can also be granted to users with profiles that reflect their BFP and Unified Registry responsibilities.** It is also possible for the municipal and state managers and their staffs to access the relevant state or municipal Term of Adherence to the BFP.

**The SIGBFP** also uses an important tool that enables the **dispatch and receipt of files, thus facilitating flexible exchange of information between the MDS and BFP stakeholders.** The "Root Folder" contains all the files provided by the MDS to the municipalities. The files can be accessed by clicking on the relevant areas: Benefits, Unified Registry or the Decentralized Management Index (IGD) (Figure 1).

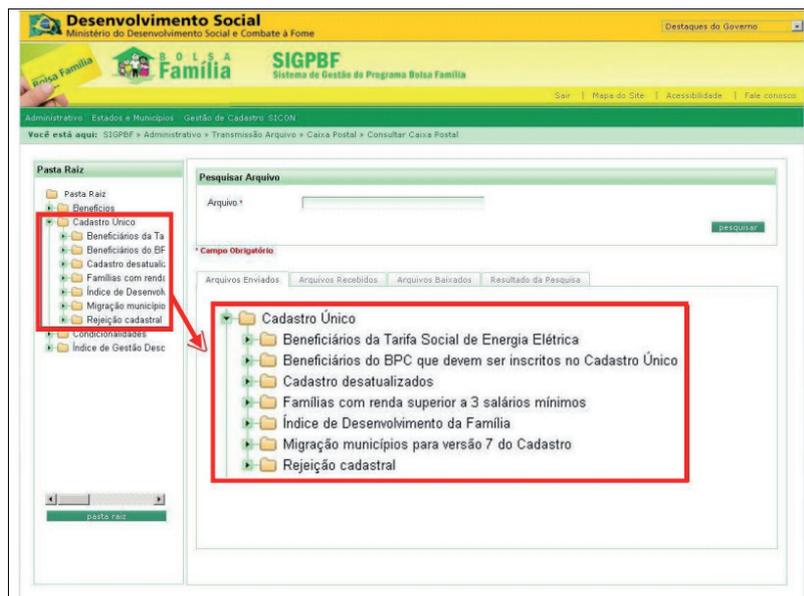
<sup>1</sup> For details of the *Bolsa Familia* Decentralized Management Index (IGD), see articles 1 and 2 in this series.

FIGURE 1 - SIGBFP SCREEN SHOWING THE ROOT FOLDER



The “Benefits” folder contains files relating to the Benefits Management area, e.g. the list of beneficiary families subject to the Registration Review (*Revisão Cadastral*)<sup>2</sup> process, while the “Unified Registry” folder contains files with data on activities related to BFP registration procedures such as auditing and data-updating. The “Decentralized Management Index” folder contains files on the municipal decentralized management index which display all the IGD-M financial transfers made, as well as a record of the municipality’s past performance. Furthermore, each folder contains a number of sub-folders, as illustrated in Figure 2 (“Unified Registry”).

FIGURE 2 - SIGBFP SCREEN: “UNIFIED REGISTRY” SUB-FOLDERS



2 BFP beneficiaries are required every two years to update their data in the Unified Registry in order to prove that they comply with the eligibility criteria of the program. BFP central management generates a list annually of municipalities containing all the families who need to submit to this review process (known internationally as “re-certification”). Municipal BFP managements access this list through the SIGBFP.

Folders in the “Root Folder” may be viewable or not, depending on the user profile and the authorization of SIGBFP. Each file has two options:

- » **View:** When this option is selected, details are displayed such as: name of the file, name of the agency concerned, description, size, and date of dispatch of the file by the agency, file expiration date and a list of past versions of the file.
- » **Download File:** Selecting this option enables the file to be downloaded on the user’s computer.

In the “Downloaded Files” tab the files that the user has received and downloaded are displayed. This screen shows the “File History” (available in the “Downloaded Files” window), and “File Data”: the responsible agency, name, description, size, date and period of availability for download.

The “Sent Files” tab displays the files dispatched by municipalities to a particular agency, and the “Files Received” are those received from an agency by the municipality.

The tab “Search Results” allows the user to search files that are available in the folders. To do this, the user must type in the word related to the file, and the system will show the result, after which the users can opt to download the relevant file for further examination.

The main tools available in the SIGBFP are:

**1) Files Upload/Download:** this application is responsible for sending and receiving everyday files by the MDS, government departments and BFP partners. All the files made available for downloading by the MDS automatically generate an e-mail addressed to the manager stating that a new file has been posted. The MDS recommends BFP managers and technical staff to consult the upload / download application daily in order to check the arrival of new files, to read the information, guidelines, etc contained therein, and to take appropriate action when necessary. This procedure is intended to ensure that the recipients remain thoroughly up-to-date on BFP and Unified Registry matters. In other words, **the upload / download procedure assures a constant exchange of information on the BFP and Unified Registry between the responsible parties at both federal and municipal level.**

**2) States and municipalities:** public access allows details of the municipal and state BFP management to be known (manager’s name, business address, telephone number and e-mail). Updating of management data can only be done by registered SIGBFP users. This **tool provides a transparent way of knowing who is responsible for the BFP and Unified Registry in each state and municipal government.**

**3) Registry Management - Forms Application Support System (SASF):** municipalities can request the Unified Registry printed forms through the SIGBFP. The SASF application enables:

- » Municipalities to request Unified Registry forms over the Internet with no need to send written requests to SENARC;
- » Municipalities to keep a record of forms received;
- » Consultation of requests sent; and
- » Tracking of previous requests from municipalities.

**Unified Registry forms are requested automatically through the SASF and all the requests by municipalities are monitored.**

**4) Conditionalities Management (Conditionalities Monitoring System - SICON):** is a tool that assembles monitoring data on health and education conditionalities. The system is invaluable for incorporating and consolidating data on school attendance, vaccination schedules and prenatal consultations recorded in specific data systems developed and managed by the Ministries of Education and Health, and family monitoring information from the National Secretariat for Social Assistance (SNAS). SICON enables access to a range of data about families as well as the results obtained from monitoring of conditionalities.

**SICON provides managers with information on the monitoring of conditionalities with respect to all BFP beneficiary households.**

**5) Data Consultation, Selection and Retrieval from the Unified Registry (CECAD):** is a tool for supporting managers in planning, implementing and managing public policies for low-income families. CECAD enables simple frequency tabulation or a 2-way cross tabulation of two variables in the Unified Registry databank, e.g. cross-referencing data on maroon (*quilombo*) families and forms of water supply.

**CECAD allows access to data on families entered in the Unified Registry and enables diagnoses to be made of their housing conditions, access to services, etc.**

### **“BOLSA FAMILIA INFORMA”**

This weekly newsletter (*“Bolsa Família Informa”*) is the main communication vehicle between the federal government and the states and municipalities. Sent by e-mail to BFP managers, its purpose is to provide detailed information and newsworthy material on the BFP and Unified Registry, as well as guidance for states and municipalities on related management matters. The newsletter also informs recipients of the deadlines for finalizing Program actions, explains new rules and regulations and, inter alia, suggests guidelines for improved management.

As can be seen from the example below, the structure of the newsletter is standardized, consisting of a title, subtitle, main text, boxes containing texts on other issues, and a timetable of upcoming events related to BFP and Unified Registry management. All the issues are routinely emailed to the local managements and posted on <http://www.mds.gov.br/assuntos/bolsa-familia/gestao-do-programa/informes-1>.

Ministry of Social Development and Fight against Hunger

## **BOLSA FAMILIA NEWS**

National Secretariat for Citizenship Income (SENARC) No. 441 • 20 November  
2014

### **Deadline for sending IGD-2103 statement of account to MDS ends on 30 November**

States and municipalities that fail to send their IGD-2013 statements of account by the 30 November deadline may not receive IGD funds after end-December 2014. Funds will be released only after the required data has been deposited and the accounts approved by the Local Council.

30 November 2014 is the deadline for the Municipal and/or State Social Assistance Funds to submit, via the SUASWEB, to the Ministry of Social Development and Fight against Hunger (MDS) proof of disbursement in FY 2013 of the funds that they have received based on the Bolsa Familia Program Decentralized Management Index (IGD-BFP).

If data is entered after 30 November 2014, the value of the IGD-BFP of the municipality or state will be zero. Given that the value of these funds, aimed at supporting decentralized management and implementation of the BFP, is calculated on the basis of the IGD-BFP, the index in these circumstances will be equal to zero, which means that no funds will be transferred. In other words, those municipalities and states that fail to meet the deadline will be unable to receive the funds calculated on the basis of the IGD-BFP as from the end of December 2014. 2000 municipalities have to date failed to enter the required information in the MDS system (see the list **here**).

Municipal and State Social Assistance Funds can still register information about their accounts after the due date, but a municipality's situation will only be regularized as from the month following that in which the MDS has been advised that the accounts have indeed been submitted and approved by the State or Municipal Social Assistance Council (CAS). Funds cannot be transferred retroactively.

31 December 2014 is the deadline for Municipal and State Social Assistance Councils (FAS) to inform the MDS that the statements of account related to expenditure of IGD-based funds in FY 2013 have been approved.

The legislation regulating the IGD-BFP provides that non-submission of accounting information relating to disbursement of received funds will have a direct impact on the calculation of the IGD-BFP. This will affect calculations of the amounts of funds to be transferred to states and municipalities.

### Action to be taken

To enter data on FY 2013 expenditure, FAS managers need to access the SUASWEB system and select the tabs "Management" => "BFP - Bolsa Familia" => "IGD BFP Fiscal Financial". After entering information about use of the funds, the manager should then select the "Finalize" option, after which the entered data cannot be altered and the State or Municipal Social Assistance Councils (CAS) will be able to access it.

If the FAS manager makes a mistake during this process, he/she can ask the CAS to trigger the "Enable Statement" tab which will return the system to the "Data being entered" function. The CAS can access the SUASWEB with the Council President's password and select "Management" => "BFP - Bolsa Familia" => Council Opinion. The operator must then select the "Return for error correction" tab located next to the "Finalize" button.

Two points worth noting in the SUASWEB 2013 synthetic statement:

- "Being completed by FAS Manager" - means that the municipality has not yet sent the required information, and therefore must report how the accounts have been submitted to the Social Assistance Council (CAS).
- "Being resolved by the CAS" - means that even if the CAS has received the statement of accounts from the FAS, it has not yet informed the MDS of its decision regarding the accounts, and must advise the MDS of the situation.

Queries can be answered by consulting the *Manual of Guidelines on Statements of Account related to the Use of IGD Funds*. This Manual can be accessed at <http://www.mds.gov.br/bolsafamilia/gestaodescentralizada>.

Before the Fund completes its statement of account, we recommend that it should send the Council copies of expenditure-related documents. This will assist the Councillors to analyze how the funds have been used, and make decisions accordingly.

The decision to approve (or reject) a statement of accounts should be taken in a regular or special meeting of the Council, with the outcome reported in the tab "Management" => "BFP - Bolsa Familia" => Council Opinion. The Opinion must contain responses to questions relating to the monitoring of the BFP local management.

### How to access the list of families in the Registration Review

The list, by municipality, of the families included in the 2014 Registration Review and who still need to update their details, is already available in the **Bolsa Familia Program Management System (SIGPBF)**. The system was unstable last week, making it impossible to download files. The list can be accessed as follows:

- After entering the SIGPBF, pass your mouse over the *Administration* menu;
- Click on *Upload / Download Files*;
- Select the *Registration Review* folder. The file will be identified as (UF\_NOMEMUNICIPIO\_CODIGOIBGE\_REVISAO 2014.csv) – e.g.: "TO\_LAJEADO\_1712009\_REVISAO 2014.csv").

If your municipality is unable to retrieve the list, contact your State BFP Coordination which maintains lists of all the municipalities in its territory.

#### **Tutorial on CECAD is available in the EaD-MDS Portal**

The National Secretariat of Citizenship Income (SENARC) of the MDS is about to launch, next **Thursday, 20 November**, in the EaD-MDS Portal ([www.mds.gov.br/ead](http://www.mds.gov.br/ead)) the CECAD Tutorial - *Consulting, Selecting and Retrieving Data from the Unified Registry*. This tutorial provides guidance on the procedures required to consult and analyze information contained in the Unified Registry for Social Programs of the Federal Government (*Cadastro Único*). Access is free to all those interested in the subject.

The CECAD tool gives access to useful information about the socioeconomic reality of Brazilian low-income families (those with a monthly income of up to half the minimum salary *per capita* or with a total of three minimum wages). It is also possible to obtain data on the entire family nucleus and its individual members, types of housing conditions, forms of access to essential public services, etc. More information can be obtained by e-mail [suporte.ead@mds.gov.br](mailto:suporte.ead@mds.gov.br).

#### **DIARY NOTE**

**25 and 26 November** - National Intersectoral Meeting of the Bolsa Família Program. This event, to be held in Brasilia, will be attended by State BFP Coordination Units.

**27 and 28 November** - National Meeting of State Coordinators (ENCE) in Brasilia. Participants will assess achievements during year 2014 and prepare actions for 2015.

**FOR MORE INFORMATION**, access **Talk to the MDS** or contact the MDS Customer Relations Center on Tel: 0800 707 2003 (Monday to Friday, from 07:00 to 19:00 hrs).

## **WEBSITE**

The MDS website is an additional tool for providing information on the Bolsa Família Program such as laws, ordinances, decrees, normative and operating instructions, manuals and the Good Practices Observatory. The home page contains the latest news on topics, events or guidelines related to the BFP. Available at: [www.mds.gov.br/bolsafamilia](http://www.mds.gov.br/bolsafamilia).

## **MDS CUSTOMER RELATIONS CENTER**

Up to the end of 2012, the SENARC Coordination Unit was solely responsible for answering basic queries from BFP state and municipal managers and technical staffs by email ([gestor-BFP@mds.gov.br](mailto:gestor-BFP@mds.gov.br), or [cadastrounico@mds.gov.br](mailto:cadastrounico@mds.gov.br)) or by telephone (61) 3433-1500.

Although callers to “Dial 1500” were provided with answers by qualified staff (with no time limitations), the number of available lines was insufficient for the volume of calls received. This discrepancy came to light in December 2009, when the first calls log report showed that an average of only 2.5% of total demand was being met by the Unit.

Notwithstanding these limitations, the line remained open for three more years before being taken out of service by SENARC in November 2012. Deactivation of the “1500” telephone line paved the way for a new approach known as the Qualified Customer Service Plan (PQA). As a result, the SENARC Coordination Unit and the other departments came together to form the “ third level” of a single process, explained below.

Supported by a new contract with the company Call Tecnologia e Serviços, the PQA channeled calls from the municipal managers to the MDS Customer Relations Center, attached to the Ministry’s Executive Secretariat (0800 707 2003 and e-mails ([gestorbpf@mds.gov.br](mailto:gestorbpf@mds.gov.br); [cadastrounico@mds.gov.br](mailto:cadastrounico@mds.gov.br) and [bolsa.familia@mds.gov.br](mailto:bolsa.familia@mds.gov.br)). This resulted in a major boost to service capacity, given that the company has more than 100 operators, in contrast to the SENARC Coordination Unit with only around seven operators. For example, **in August 2015 some 225,000 calls were handled, corresponding to approximately 75% of total demand. Of these, about 140,000 enquiries were from social program beneficiaries and 7000 from managers. Once the system was in operation, the remaining challenge was to upgrade the quality of the response services provided under the aegis of the Customer Relations Center.**

The current enquiry structure for BFP managers and beneficiaries is as follows:

#### **1st Level – Customer Service Centers - 0800 / Call Tecnologia e Serviços**

All calls are handled by operators who consult the **computerized knowledge database** and calls are duly logged in the Calls Management System. The queries that cannot be located by the operator in the database are recorded in the Calls Management System as a pending query for obligatory onward submission to the 2nd Level.

#### **2<sup>nd</sup> Level - Support and management for the service provided at the 1st level – Customer Relations Center (CRC)**

All the queries that are not adequately dealt with at the 1st level must be routed via computer to the 2nd level team. This team is responsible for conducting more detailed research on the query topic, if necessary by contacting the MDS technical departments (3rd level) to obtain the missing information. The 2nd level team is also responsible for maintaining and updating the knowledge databases used by the CRC professionals.

#### **3<sup>rd</sup> Level – Provides support to the MDS technical departments to handle queries that have not been answered at Levels 1 and 2 – SENARC Coordination Unit.**

The 3rd Level consists of professionals from MDS technical departments who provide the information requested by the 2nd Level. Every query not addressed satisfactorily at the 2nd level must be routed by computer to the staff at the 3rd level, responsible for providing the necessary information.

The MDS Customer Relations Center (2nd level) is one of the main points to gain access to the MDS Ombudsman – an important channel for citizens to register their concerns.

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The Ombudsman is available for the beneficiaries or non-beneficiaries of the programs developed by the MDS to present comments, suggestions, compliments, complaints or allegations. The Ombudsman is responsible for analyzing all such incoming material and to route it to the appropriate sector and follow it up until a satisfactory response can be given to the respective complainant etc.

The Ombudsman also suggests changes to managers with a view to improving service processes or delivery and ensuring that citizens are provided with adequate responses to queries.

Citizens can contact the Ombudsman by telephone (0800 707 2003), by emailing a specific form ([http://www.mds.gov.br/form\\_ouvidoria](http://www.mds.gov.br/form_ouvidoria)) or by letter addressed to the MDS.

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The services contracted with the company (1st level) involve providing information and answering queries about MDS programs and policies, giving specialized technical advice to users of the MDS information systems, and feedback to concerns raised by the Ombudsman.

**To assist with the queries received by the Customer Relations Center, the SENARC makes available its updated knowledge base consisting of FAQs to be used for telephone queries and a list of Standard Answers (Respostas Padrão) for e-mail queries.**

The 1st Level telephone service is operated by staff qualified to:

- a. Receive and log incoming information, queries and requests in accordance with standardized procedures involving checking knowledge bases (FAQs for telephone enquiries and “Standard Replies” for answering emails) and available databases and data systems;
- b. Provide clear and objective information and guidance to enquires from within the MDS;
- c. Log and then forward queries that cannot be answered immediately (i.e. information that is unavailable in the knowledge base) to the 2nd Level.

The following units and individuals are involved in handling phone queries: generalists, SENARC specialists, SNAS specialists, SESAN specialists, SESEP specialists and the Ombudsman.

- » Generalist unit: for answering general telephone queries from beneficiaries and non-beneficiaries of MDS social programs;
- » SENARC specialist unit: for answering telephone queries from BFP and Unified Registry managers and technical staffs;
- » SNAS specialist unit: for answering telephone queries from managers and technical staff of the National Social Programs Secretariat (SNAS);
- » SESAN specialist unit: for answering telephone queries from managers and technical staff of the Food Security and Nutrition Secretariat;
- » SESEP specialist unit: for answering telephone queries from managers and technical staff related to the Brazil Extreme Poverty Plan of SESEP, the Extraordinary Secretariat for Overcoming Extreme Poverty; and
- » The Ombudsman unit: to deal exclusively with calls regarding comments, suggestions, compliments, complaints or allegations.