Telephone Interviews

Making the process work for you

Presented by
Food Stamp Policy Unit
June 2009

Resources

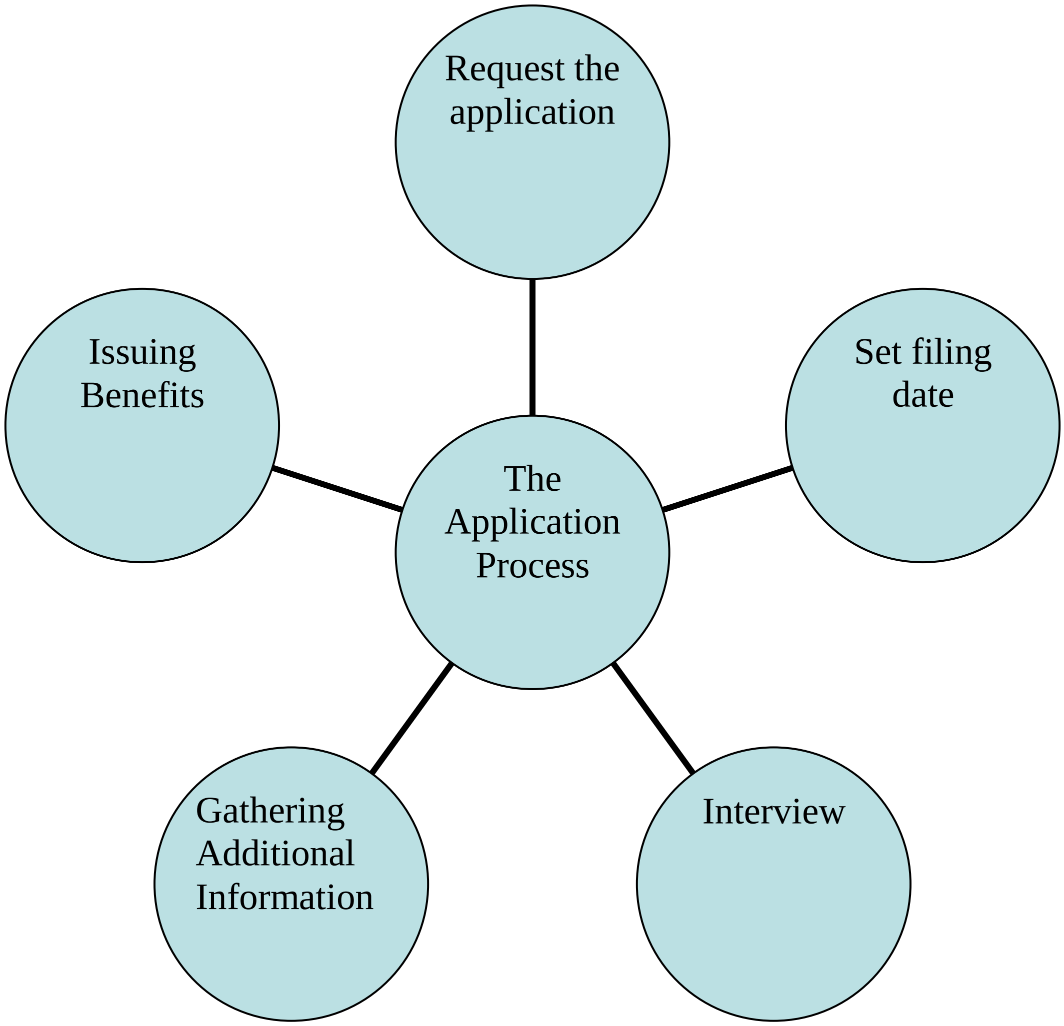
Policy, FS – GroupWise address

Anne Hilgers	(503) 945-6105	anne.m.hilgers@state.or.us
Dawn Myers	(503) 945-7018	dawn.myers@state.or.us
Eliza Devlin	(503) 947-5105	eliza.y.devlin@state.or.us
Rosanne Richard	(503) 945-5826	rosanne.richard@state.or.us
Sandy Ambrose	(503) 945-6092	sandy.ambrose@state.or.us
Sarah Lambert	(503) 945-6220	sarah.d.lambert@state.or.us

Quick Reference of forms

Form Number	Where is form located	Use
6608A	Form Server	Allows client to select convenient times for the interview
GS1090A	Notice Writer	Notice of the scheduled interview date/time
FSMA411	Notice Writer	Notice of Missed Interview
210/539H	Form Server	Request for additional information
FS7832R	Notice Writer	Referral to OFSET contractor

The Application Process



Scheduling the interview

Every person applying for FS (at certification or recertification) must receive an appointment date and time.

If the person states they have a difficult time returning to the office for one of the following reasons, they may be given a phone interview instead. The hardship reasons are:

- Disabled
- Elderly (age 60 and older)
- Working
- Caring for a person in the household who is disabled
- No transportation
- Lack of child care
- Illness
- DV safety issue
- Bad weather

When a hardship reason is given, schedule a phone interview. Narrate the hardship reason in TRACS/ACCESS.

"(Client name) is unable to come for in-office interview due to (hardship reason). Phone interview scheduled for (date and time) at (give their phone number.)"

The client is asked to complete all of the FS pages in the application and to sign at the back. A copy of the client's ID should be attached to the application.

The applicant should be given an appointment card with their appointment date and time. Include the office phone number and extension if the client is to call the worker or state the client must be at their stated phone number to wait for the call from the worker.

Notice of Missed Interview (NOMI)

For clients who miss their scheduled interview, a NOMI must be sent. The NOMI must be sent within 2 days of the missed interview, and can be done in 3 different ways:

1. 411 Post Card
2. Notice Writer (FSMA411)
3. Phone call to client

Definition of an effective telephone interview

An effective telephone interview is a timely and well prepared exchange of information. This should be used to gather accurate and detailed information that is required to determine eligibility. There should be little or no inconvenience to the worker or client.

An effective interview whether by phone or in person should arrive at the same result, which is accurate and timely benefits for the client. The key to a good interview is asking the right questions to elicit all of the information you need to make a good decision.

- ☎ **Be Prepared**
  Review the application and all appropriate screens prior to making the call. Have a list of questions based on the information that you have found.

- ☎ **Stay focused**
  Don't allow the conversation to get off topic. Let the client know how much time you have available for the interview, and redirect if the client starts sharing information that is not necessary.

- ☎ **Ask questions**
  Based on the answers that the client provides ask follow-up questions. For example, "so you told me that your roommate picks up your son from school can you tell me about your roommate? Do you share the household expenses?

- ☎ **Use the application as a guide**
  Asking your questions based on the flow of the application will help keep consistency with the application, but don't be afraid to go back and revisit something if the client has given you some new information.

☎ **Explain the process to the client**

Let the client know what will happen next, if they can expect their benefits, or when their notice will be mailed. Do you need additional documentation from them? Are they eligible/ineligible for benefits?

Preparation

Caseworker

- ✓ Review the previous narrations against the current application
- ✓ Review case record for documentation previously provided
- ✓ Review all screens before or during the interview
- ✓ Make notes of questions and needed verification

Workspace

- ✓ Let peers know your interviewing schedule
- ✓ Set up your materials like you are doing a face-to-face and have them at your fingertips
- ✓ Have the online screens up and running
- ✓ Have a list of on-line verification sources available
- ✓ Have your prepared questions ready

Client

- ✓ Ask if they have 15 to 20 minutes available to have the interview
- ✓ Explain how the phone interview process will work
- ✓ Remind them to set aside enough time to complete the interview
- ✓ Ask them to turn off radio, TV etc
- ✓ Remind them to ask questions if they do not understand what is being discussed

Conducting the interview

☎ **Identify the interviewee**
Ask some questions about other benefits the client may be receiving (medical, ERDC, TANF). Ask about previous address listed in the case file, social security number, date of birth.

☎ **Follow the application and review the information**
Make sure all areas of eligibility are discussed – Expedited criteria, household composition, students, income, deductions

☎ **Take notes or narrate as you go**
This will save time. Also you could make notes and transfer to your narrative later, but this will be an additional step you will need to take.

☎ **Listen for inconsistencies**
Is anything that the client is telling you in conflict with the information on the application? Ask follow-up questions to make sure you have everything you need to determine eligibility.

☎ **Only request necessary information**
For eligibility we can take the clients statement for lots of information, only ask for verification of required information (income, non-citizen status etc.).

☎ **Conduct the interview professionally**
Act as if the client was sitting right across from you in the office.

☎ **Practice active listening**
Listen for what the client is saying and not saying. You don't have the benefit of physical cues.

☎ **Review the Rights and Responsibilities with the client**

☎ **Explain their reporting requirements**

After the interview

It is best to take any necessary action as soon as you complete the phone interview. The following should be done as soon as possible:

- ☎ Send the pending notice requesting any additional information
- ☎ Process received follow-up information
- ☎ For clients who are mandatory for OFSET refer the client to the contractor using the Notice Writer notice (FS7832R)
- ☎ Update the computer (FSMIS)
- ☎ Send the appropriate notices to the client
- ☎ Narrate, Narrate, Narrate

Note: Due to the waiver, you are not required to narrate a reason for waiving the interview.

Customer service

Customer service can be defined as meeting client needs. In order to give good customer service it is important to focus on the client. Professional customer service requires many different skills.

☎ **Empathetic and Courteous**

⇒ Be sensitive and sympathetic to the client's individual situation

☎ **Positive and Confident**

⇒ Be knowledgeable and confident in your ability to help clients understand

☎ **Enthusiastic**

⇒ Demonstrate a friendly attitude.

☎ **Prompt and Efficient**

⇒ Do what you say you are going to do. Take the actions within the timeframe that you have promised.

☎ **Flexible**

⇒ Listen to the client completely, each client is unique and has their own story.

Always smile…even though you're on the phone

Listening skills

There is a difference between hearing someone and listening to them. Hearing someone is just the physical part of using your ears, but listening to someone involves interpreting what the person is saying and understanding what you have heard. Listening requires your full attention.

Techniques for improving listening skills:

☎ **Don't let your mind wander – Concentrate**

Do whatever you need to do to stay focused on what the client is telling you, make notes or high light sections of the application while the client is talking.

☎ **Take concise notes when you need to**

It is important to write notes during the conversation, but don't try to write down everything.

☎ **Don't interrupt**

Allow the client to answer your question fully before asking a follow-up question.

☎ **Use the client's name**

This will make the client feel more connected to you, and that you are paying attention to them.

☎ **Give the client verbal signs that you are listening**

If the client was sitting across from you, you would nod your head or look at them to show that you are listening. When you are talking over the phone you need to use verbal cues. Say things like: I see, I understand or I see what you mean.

☎ **Ask questions**

Good communication is a two-way street. If you don't understand something that the client tells you ask them follow-up questions, or repeat the situation back to them just to make sure that you understand fully.

Practice Listening…Your skill will improve

Speaking skills

For phone interviews, your speaking skills are very important. Some things can be done to assist you in speaking more effectively.

☎ **Breathe**
The way that you breathe while you are speaking will help to promote your confidence, allows you to speak in a stronger voice so client's can hear you better, and it will help you be more relaxed.

☎ **Pitch**
If you speak with a lower pitch, people will be able to understand you better, and it will be easier for them to listen to you.

☎ **Tone**
The tone of voice you use will reflect a lot of information to the client about how helpful you are, if you are confident, and how you view them. To keep a good tone: Smile, picture the client sitting across from you and treat them as if they are the only interview that you are doing that day.

☎ **Rate**
Slow down so the client has time to understand what you are saying to them, and so they can take some notes if they need to.

☎ **Enunciation**
If you take the time to enunciate words you will naturally slow down the rate of your speech and make it much easier for the client to understand you.

Vocal skills

What you say to clients is very important. Good vocal skills can help reduce the amount of time you spend on your interviews, and increase the understanding of what you have said.

☎ **Use common courtesy words**

Please and thank you will set a good tone for the conversation, as well as making the interview professional.

☎ **Don't use acronyms and jargon**

We speak our own language that clients may not understand. Always explain what you are talking about.

☎ **Explain the reason for your silence**

It is okay to have breaks in the conversation to look up information on the computer, or review parts of the application, but always let the client know what you are doing.

☎ **Explain why you are asking questions and use appropriate questioning techniques**

Food Stamp Phone Interview Check List

- ❍ Narrate the reason FTF interview is being waived:
    - o All adult members of the group are age 60 or older, or have a physical or mental disability;
    - o There are transportation problems; or
    - o Other hardships
      ____

Preparation

- ❍ Application reviewed
- ❍ Narratives back to last certification reviewed
- ❍ Review of screens for each person (ECLM, SMUX, W204, WAGE, DPPL, SSNX, HINQ, SFMU etc...)
- ❍ Compile list of questions about missing information or conflicting information
- ❍ Check that ID has previously been verified (case record/narration/CI find)

Scheduling the Interview

- ❍ Cold Call
- ❍ 6608A
- ❍ Scheduled appointment
- ❍ Explain the purpose of the interview and the time that will be required

Interview

- ❍ ID the interviewee
- ❍ Follow the application and review information
- ❍ Ask open-ended questions
- ❍ Take notes or narrate in TRACS or ACCESS as you go
- ❍ Review the Rights and Responsibilities with the interviewee
- ❍ Explain their reporting requirements

Closing the interview

- ❍ Ask the interviewee if they have any questions
- ❍ Ask the interviewee to explain their reporting requirements to you
- ❍ Explain to the interviewee what follow-up is needed if any, 210/539H
- ❍ Explain to the interviewee what happens next and what the timeframes are

Completion

- ❍ Send the 210/539H if required
- ❍ Process received follow-up information
- ❍ Update FSMIS
- ❍ Send approval or denial as appropriate
- ❍ Narrate, Narrate, Narrate