Department of Human Resources 311 West Saratoga Street Baltimore MD 21201	FIA ACTION TRANSMITTAL
Control Number: # 11-02	Effective Date: June 29, 2010 Issuance Date: July 28, 2010

TO: DIRECTORS, LOCAL DEPARTMENTS OF SOCIAL SERVICES
DEPUTY/ASSISTANT DIRECTORS FOR FAMILY INVESTMENT
FAMILY INVESTMENT SUPERVISORS/ELIGIBILITY STAFF
DIVISION OF ELIGIBILITY WAIVER SERVICES
HEALTH OFFICERS, LOCAL HEALTH DEPARTMENTS
LOCAL HEALTH DEPARTMENT ELIGIBILITY STAFF

FROM: KEVIN M. MCGUIRE, EXECUTIVE DIRECTOR
DEBBIE RUPPERT, EXECUTIVE DIRECTOR, DHMH/OES

RE: USING TELEPHONE INTERVIEWS AS AN ALTERNATIVE TO FACE-TO-FACE INTERVIEWS

PROGRAM AFFECTED: ALL PROGRAMS

ORIGINATING OFFICE: OFFICE OF PROGRAMS

SUMMARY:

Because of the economic conditions and limited resources, local departments of social services are serving larger numbers of customers. Caseloads have risen drastically, thus case managers are spending increased amounts of time conducting face-to-face interviews. Local departments should use telephone interviews as much as possible.

This action transmittal provides brief information on how local departments can use the telephone as an alternative interviewing tool. It also provides information about the CARES migration that will support telephone interviewing.

Any local department that wishes to schedule telephone interviewing training should call the University of Maryland School of Social Work, Policy and Skills Training Team at 410-706-4388.

REQUIRED ACTION:

Face-to-face interviews are no longer required at application and redetermination for Temporary Cash Assistance (TCA), Food Supplement Program (FSP), Temporary Disability Assistance Program (TDAP), Public Assistance to Adults (PAA), Burial Assistance (BA) and Medical Assistance (MA). In addition, a face to face interview is not required for Welfare Avoidance Grants or Emergency Assistance to Families with

Children (EAFC). Local departments should revise their local plans if they contain a requirement for a face to face interview.

If an applicant for any program requests a face-to-face interview, you must comply with this request and schedule one to take place as quickly as possible.

TELEPHONE INTERVIEWING TIPS

An interview, whether face-to-face or by telephone, is a structured communication for the purpose of gathering necessary customer information to assist in determining eligibility. Its success depends on the skill of the interviewer and the rapport that develops between the interviewer and the customer.

A. Plan the telephone interview. It requires preparation.

1. Get organized
2. Decide the objective of the call

   - What is it you need to know?
   - Why are you calling the customer?

3. Familiarize yourself with relevant past and current information
4. Write down all information needed
5. Gather complete and accurate information

B. During the interview

1. Confirm your understanding of the circumstances

   - Ask questions until you are clear on all issues,
   - Request that the customer repeat them back to you.

2. Use a good closing statement to prevent unnecessary and time-consuming phone calls to and from customers.

   Examples: "Is there anything else you need to tell me before we hang up?"
   "Do you have any questions for me?"
   "Do you know what information you need to send/bring in?"
   "Do you understand all that we talked about?"

<u>CARES ACTION REQUIRED:</u>

Because we must report on the number of telephone interviews we complete, it is important that you code CARES to capture when the interview is completed by phone.

Effective June 28, 2010:

- The CARES **MISC** screen was modified as follows:
  - New fields – Telephone Interview and Date
    - For intake and redetermination interviews conducted by telephone, enter a **Y** in the **Telephone Interview** field and the date the telephone interview was conducted.
  - New valid value of T (telephone interview) for the Redetermination Method
    - Enter **T** in the **Redet Method** field if the next scheduled redetermination can be completed via a telephone interview.
    - After the redet is completed, if it is a simplified reporting case the **T** Redet Method will be "flipped" by CARES to an **M** (mail in) for the next redetermination appointment. If there are related AUs that have redets scheduled within 3 months of that AU with a combination of **F** and **M** or **M** and **T** redet methods, the **T** will be flipped to **F** and then locked as **F***, indicating it was flipped by CARES. If it is not a simplified reporting case, the **T** will not be flipped to any other value.
  - New field next to Appointment Type - **Interview Method**
    - Enter a **T** in this field to indicate the appointment is for a telephone interview.
- The **SCDI** (Screening Disposition) and **SCHD** (Daily Schedule) screens were modified to capture an **Interview Method** of **T** (telephone interview).
- The Redetermination and Intake Appointment Notices have been modified to indicate when a telephone interview has been scheduled.

NOTE: The special procedure of entering **TE** (telephone interview) in the **Special Circumstances** field on the **ADDR** screen is no longer necessary effective June 28th.

INQUIRIES:

Please direct TCA and TDAP policy inquiries to Marilyn Lorenzo at 410-767-7333 or Gretchen Simpson at 410-767-7937. Direct PAA questions to Deborah Weathers at 410-767-7994. Direct FSP policy questions to Rick McClendon at 410-767-7307. Direct CARES questions to Joyce Westbrook at 410-238-1299.

Please direct Medical Assistance policy questions the DHMH Division of Eligibility Policy or MCHP policy questions to the MCHP Division, both at 410-767-1463 or 1-800-492-5231 (select option 2 and request extension 1463), and CARES questions to Debbie Simon at 410-238-1363.

cc: DHR Executive Staff
DHMH Management Staff
FIA Management Staff
Constituent Services
DHR Help Desk