

# FREQUENTLY ASKED QUESTIONS

## *The 411 on Phone Interviews in California*

**QUESTION: What does the USDA-approved waiver say?**

ANSWER: On June 30, 2009, the USDA approved California's request to waive the face-to-face interview requirement for all food stamp households at intake and recertification without the need to show hardship.

Specifically, the waiver, #2090051, states:

"This waiver would provide counties with the option to waive the face-to-face interview requirement at initial application and recertification for all non-public assistance SNAP households. In lieu of the face-to-face interview, telephone interviews will be conducted without the need to document whether a hardship exists."

The only condition of approval the waiver highlights is that county offices "must conduct a face-to-face interview, if determined to be appropriate. However, the counties must not require a household to attend an in-office interview, if attending the interview would be a hardship, as determined by CDSS."

The policy was approved for four years, effective June 1, 2009, an extension of the standard approval period given the "positive outcomes this policy has had for recipients and program administration" across the country. This waiver replaces previous related waivers, #2090005 and #2070014. To read the full USDA waiver and waiver response form, please [click here](#).

**QUESTION: What does the related All-County-Letter say?**

ANSWER: On October 23, 2009, the California Department of Social Services released All County Letter No. 09-62 providing California counties with the opportunity to increase program access and participation for working and needy households across the state by waiving the face-to-face interview at intake and recertification. Specifically, the letter states that "in lieu of the face-to-face interview, telephone interviews must be conducted and there is no need to document whether a hardship exists."

There are four key components of the letter:

1. This waiver replaces previous face-to-face waivers #2090005 and #2070014.
2. The information required to be collected does not change. Specifically, it states that counties will "continue to verify and review the information and supporting documentation supplied by the household, and take the

same actions during a telephone interview as during a face-to-face interview, per Manual of Policies and Procedures (MPP) Section 63-300.”

3. Households can request a face-to-face interview or a county can require a face-to-face interview if determine necessary.
4. Households must complete the SFIS requirement at any time before recertification to be provided a phone interview at recertification.

To read the full letter, please [click here](#).

**QUESTION: How does this policy fit with other efforts to improve access and participation?**

ANSWER: This policy fits nicely with efforts over the last several to increase access for the working poor. Barriers such as the auto-rule, asset test, and more have all been undertaken to improve access. This policy now addresses the long waits and frequent trips to the office which have been key complaints of low-wage workers trying to access the program.

With this new policy California can continue its efforts to rebrand the food stamp program as modern and improved. This movement of the program out of the office would not only shift policy but perception of the program as well.

**QUESTION: Will I need new money, new staff, or new technology to make this policy work?**

ANSWER: While money and technology can be helpful, other states and some counties here have shown that these changes can be made absent new resources.

The reality is that given the current economic crisis an influx of money to support change isn't coming anytime soon. But other states and some counties in California have been able to move the Food Stamp Program out of the office within current administrative funding. They have been able to use existing staff in new ways. While technology upgrades to support this effort have been sought and the only technology that is absolutely needed is a phone.

The Governor's 2011 State Budget Proposal includes funding for administrative improvements, such as document imaging and phone systems that should help implement this new policy.

**QUESTION: We have already implemented the previous waivers of the face-to-face interview. How is this policy different and why is it important?**

ANSWER: Under previous waivers, only a certain segment of the population had the opportunity to have a phone interview at intake or recertification, and even then,

they had to show a hardship. In short, households had to “opt-in” to request a phone interview. More often than not, clients would have to come into the office to find out that they didn’t need to come in and could have completed the interview over the phone.

With this current waiver, detailed in [ACL 09-62](#), ALL households are offered and provided a phone interview at intake, recert, or both. This policy is critical in removing access barriers to the Food Stamp Program that prevent households from completing the interview. In addition, this policy will enable county offices to increase timeliness and participation and reduce the long lines without affecting quality of service and error rates.

Face-to-face interviews can still be conducted if a household requests one, a county determines it is necessary to verify conditions of eligibility, or a household has not completed the finger imaging before recertification.

**QUESTION: We already provide phone interviews for all recert cases. Why is it important to provide them at intake?**

ANSWER: California’s food stamp participation problem is so severe that we must improve access at the front end as well. Phone interviews at recert are a great first step. They will make it easier for existing participants to maintain the nutrition assistance they need. But recert phone interview don’t help new applicants – and California must get more new applicants into the program.

The working poor would especially benefit from easier access at application given their work commitments. Only 33% of eligible working Californians participate in the food stamps – increased access through phone interviews at application can help improve this measure.

**QUESTION: If our county adopts this policy, can we choose to apply at intake or recert, or must we apply it to both intake and recert?**

ANSWER: A county can choose to apply the waiver for all households at intake, recert, or both. If your county chooses to apply the waiver at only one point, e.g. intake or recert, they should consider moving towards applying it to both intake and recert. California’s food stamp participation problem is so severe that we must do all we can to get more new applicants into the program. The working poor would especially benefit from easier access at application given their work commitments. Only 33% of eligible working Californians participate in the food stamps – increased access through phone interviews at application can help improve this measure.

**QUESTION: How will this policy affect the SFIS requirements? What's the use of phone interviews if people still have to come into the office to get finger printed?**

ANSWER: There is no way around this: phone interviews would certainly work best without the state's finger print requirement. But until that awful policy is removed, we must follow state law and regulation. This doesn't mean phone interviews won't work, it just means that folks need to know the rules.

The food stamp manual states that

"The CWD shall attempt to complete all SFIS requirements not completed at time of certification, when the household member(s) is/are in the office for any reason. The CWD shall not require the household member to make a special trip into the office solely for the purpose of the SFIS compliance. However, a household that has not met SFIS requirements during the initial certification period must satisfy the SFIS requirements by the end of the household's initial certification period or prior to being recertified. If the household member does not comply with SFIS requirements, the CWD must take appropriate action..."

This means that a phone interview can occur at application without a finger print and benefits can be issued. The household can meet the finger print requirement at any time over the following twelve months when they are in the office for other business. The policy does make it clear that if the finger printing hasn't happened by the twelve month recertification, the applicant will need to get printed before provided a phone interview.

**QUESTION: Our County is planning to implement the waiver and we would like to convene a staff training. Where can I find phone interview training materials?**

ANSWER: You've come to the right place! There are several different materials that we gathered from across the country and state, which can be modified and adapted to fit your county.

In Massachusetts, Mary Ann Marshall designed several documents for her staff as part of the phone interview training she delivers across the state and country, including:

- [Helpful Hints for Telephone Interviews](#)
- [Application Summary Checklist](#)

In New York, as part of their *Working Families Food Stamp Initiative*, which aims to address some of the factors affecting participation rates by "making it easier for working families to apply for and/or recertify for food stamps," the state has developed the [Telephone Interviewing Curriculum](#) and an [Interview Checklist](#).

In Oregon, the Food Stamp Policy Unit developed a short packet for staff entitled, "Telephone Interviews: Making the Process Work for You," which includes some helpful tips for vocal, speaking, and listening skills, as well as a "Phone Interview Check List." To view the packet, [click here](#).

In Pennsylvania, Kevin Fedors designed a training packet, which includes a training video and [Phone Interview Tips for Eligibility Staff](#). To receive a copy of the video, please feel free to contact Mr. Fedors at [kfedors@state.pa.us](mailto:kfedors@state.pa.us).

Los Angeles County has developed a training presentation, entitled "Telephone Etiquette/Telephone Interviewing and Listening Skills." To download a copy of the presentation, [click here](#).

If you would like to share your county's phone interview policy, training materials, and/or public education information on this website, please e-mail Evonne Silva at [evonne@cfpa.net](mailto:evonne@cfpa.net).

**QUESTION: Our County is concerned that we will receive incomplete application packets and verification documents if we adopt phone interviews in lieu of face-to-face interviews. How have other states addressed this?**

**ANSWER:** There are several ways that other states have addressed this issue. A consistent factor, however, of successful phone interview procedures across the country is preparation—the worker is prepared and prepares the client by being focused, clear, and well versed in what is expected and needed to complete the interview and process.

In New York, they are re-examining the notice included in their application packet to provide more clarity about the process and what is needed to complete the application and interview process.

In New Mexico, they have successfully streamlined and simplified their notices, implementing 3 key changes:

1. "Easy as 1-2-3" They highlighted the three key steps to completing the application on their notice in large font: (1) Complete the application (2) Turn in the Application (3) Call us to schedule an interview within five (5) days. *If the county office doesn't hear from someone for whom they have received an application, the worker will send the applicant a notice for interview.*
2. Add some color! The notices were made more appealing by adding color.
3. Remove the excess. When they discovered that they had an overkill of forms and paper in the application packets, they removed the forms that did not need signature and review those forms over the phone.

In Oregon, they have piloted an “Interview Information” form in select counties which asks the client to write down their preferred day of the week and time for a phone interview, as well as the best phone number where they can be reached.

To download the sample documents mentioned above, please visit the [Sample Documents](#) section on our website.

**QUESTION: My County provides the Rights & Responsibility (R&R) section in video format. How will the phone interview policy affect that practice?**

ANSWER: Under this policy, counties must continue to inform households of their rights and responsibilities and obtain a signed Rights and Responsibility form to complete the application process.

Counties who offer R&R’s in a video format should consider uploading the video to their website, along with a downloadable version of the related form. In this way, clients are able to view the video from home, work, or library, and then print, sign, and mail the required form.

Households unable to access the internet or come into the office to view the video should not be denied a telephone interview. In these cases, the worker should review the R&Rs during the telephone interview.

For additional information or technical assistance, please contact Evonne Silva at [evonne@cfpa.net](mailto:evonne@cfpa.net).

**QUESTION: My County is interested in implementing this policy but we are incredibly overwhelmed. Is there a deadline to implement?**

ANSWER: There is no deadline in which counties must decide whether or not to implement this policy. However, given the severity of California’s food stamp participation problem, we must do all we can to get more new applicants into the program and make it easier for existing participants to maintain the nutrition assistance they need.

The working poor would especially benefit from easier access at application given their work commitments. Only 33% of eligible working Californians participate in the food stamps – increased access through phone interviews at application can help improve this measure.

The policy has been approved by the USDA for 4 years—a period twice as long as the standard approval period given the positive outcomes seen across the country and state. In California, this popular and much anticipated policy is seen as an opportunity to increase program access and improve caseload management. More than half (60%) of the 40 counties surveyed by CFPA stated

that they are planning or have already implemented the policy. Don't be left behind!

**QUESTION: Our County will be converting to the C-IV consortia. How have C-IV counties found this policy to impact the system and/or conversion?**

ANSWER: C-IV counties have found that the C-IV system, particularly the online application, [C4Yourself](#), provides a real opportunity for phone interviews to succeed as the process moves along in a more timely fashion. The working poor would especially benefit from easier access of phone interviews in conjunction with online applications given their work commitments, particularly as only 33% of eligible working Californians participate in the food stamps.

Of the 28 C-IV Original or Migration counties surveyed by CFPA, over half are planning to or have already implemented the phone interview policy in their respective county. If you would like to include the phone interview implementation plan or policy your county has developed on this website, please e-mail Evonne Silva at [evonne@cfpa.net](mailto:evonne@cfpa.net).

**QUESTION: How should we handle expedited cases under this new phone interview policy?**

ANSWER: Under this policy, the requirements for expedited services remain the same. That is, if a household qualifies for expedited services, the food stamp office must provide the expedited food stamps no later than three calendar days after the application date. [7 C.F.R. § 273.2(i)(3)(i); MPP § 63-301.531.] For more information about expedited services and deadlines, please [click here](#) to visit the Food Stamp Guide.

Clients who are in need of immediate help should be encouraged to come into the office to receive benefits.

**QUESTION: How can we ensure that a client will be available at the time of the scheduled phone interview?**

ANSWER: Food stamp offices across the country have found several successful ways to ensure that they connect with clients for a phone interview. In some states, clients are asked for three (3) key pieces of information:

1. Preferred/Available Day of the Week and Time of Day
2. Preferred/Best Phone Number
3. Alternate Phone Numbers

In other states, such as New York, once an application is received and phone interview scheduled, a case worker contacts the households up to two times

before the scheduled interview on preferred dates and times in an attempt to complete the interview.

Oregon is piloting the “Interview Information” form in select counties, asking clients for the key information listed above. To download a copy of this form and other phone interview information forms, please visit our [Sample Document](#) section.

**QUESTION: What does this mean for individuals who are required to have a face-to-face interview through another program, e.g. CalWorks?**

ANSWER: The waiver for food stamps does not change the interview requirements for other programs. Applicants required to come into the office for a CalWORKS interview must still do so.

If we were trying to implement this phone interview policy several years ago, the CalWORKS interview requirements would have severely limited the impact of phone interviews. Not too long ago, the majority of food stamp participants also received CalWORKS, so waiving the face-to-face for food stamps would not have helped the majority of participants. **But today, approximately two-thirds of food stamp participants DO NOT participate in CalWORKS.** Waiving the face-to-face interview for the food stamp program helps a whole lot more households today than it ever could.

**QUESTION: When and how should I notify clients of this change in policy?**

ANSWER: When counties decide to adopt phone interviews, they should immediately develop a plan for communicating this change internally and externally. The situation we want to avoid is someone making a trip to the office just to find out that they didn’t have to come in.

Internally, counties should update their websites and outgoing phone messages, and inform all staff, including those who work on other assistance programs, of the new county policy.

Externally, counties should inform their local 411 and other information referral services, community-based organizations—especially those doing outreach or application assistance—and the legal services community of the new county policy.