

Telephone Interviewing

Making it Work



AAFSD Conference
Burlington, VT
October 2008

Today's Agenda

- The Massachusetts experience
- Where we are today
- How to make it work



Massachusetts Dept. of Transitional Assistance

- State Administered
- Central Office, 26 local full-service offices/centralized SSI office
- 4 satellite offices & 10 food stamp centers
- Current caseload - over 283,000 households, over 537,000 individuals (as of August 2008)



Problem

- Participation Rate State Rankings
 - 1999 - third to last
 - 2000 - second to last
 - 2001 - LAST
 - 2002 - LAST
 - 2003 - LAST



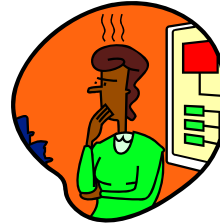
Solution???

- July 2002 - instructions to broadly apply the hardship waiver
- November 2004 - FNS grants waiver of face-to-face for all recerts



Impact of Implementation

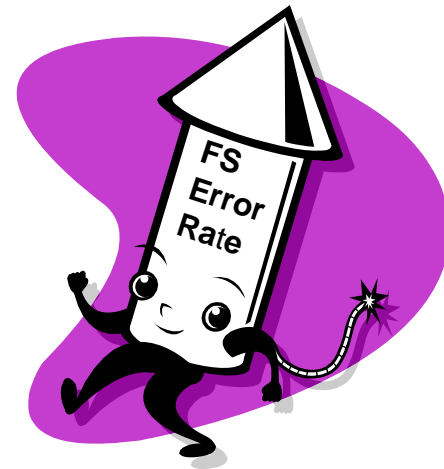
- Technical Problems



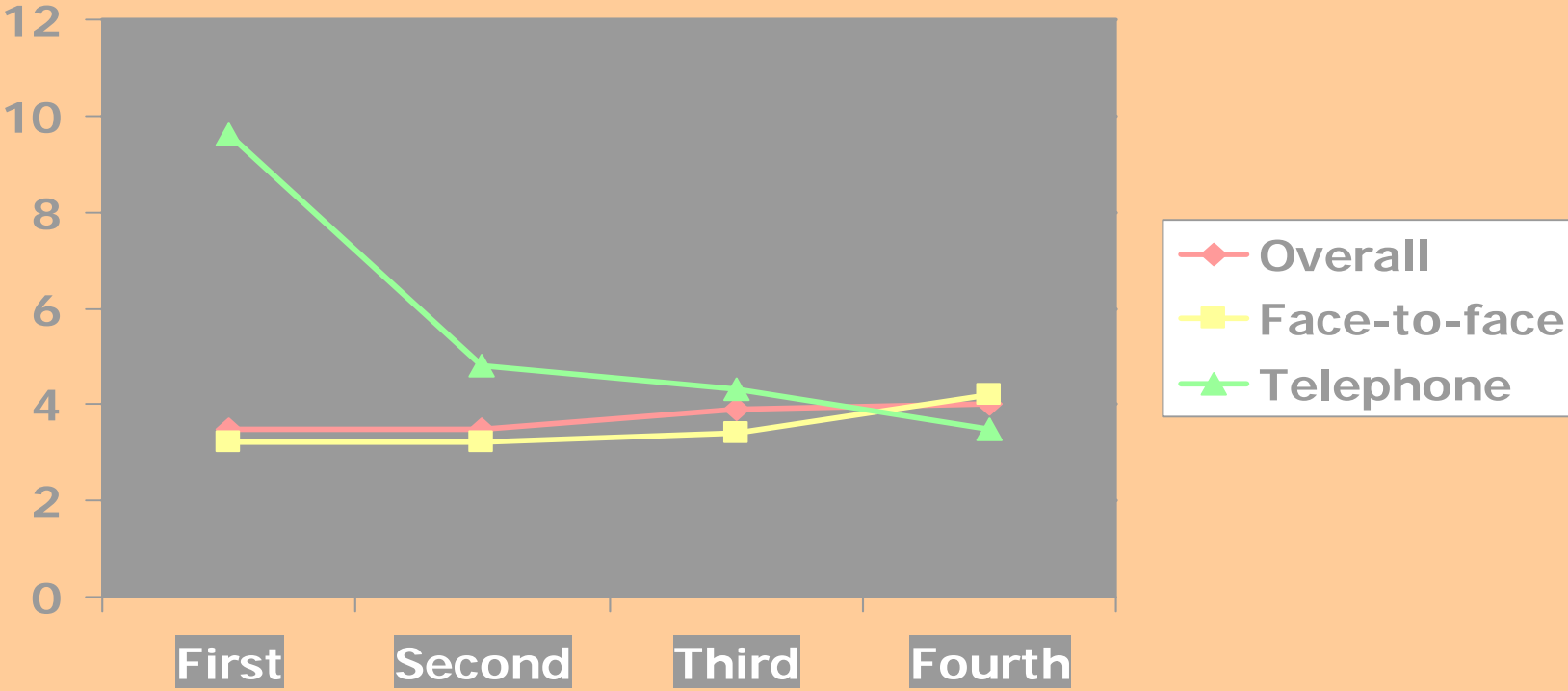
- Case Manager Resistance High



- Error Rate Skyrocketed

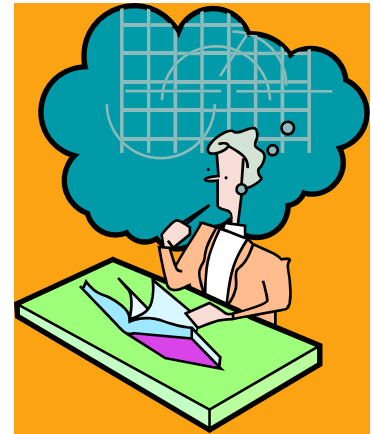


OUCH !!!



What Went Wrong???

- Lack of Project Planning
- Lack of Training
- Lack of Operational Support
- No Headsets



Real Solutions

- Administrative Support
 - Headsets
 - Operational Adjustments
- Training support
 - Part of training curriculum
 - Job Aids



Real Solutions - cont.

- Forms updated
 - Prefilled recertification forms for semiannual reporters
 - Alternate phone numbers
 - Best day and time to call

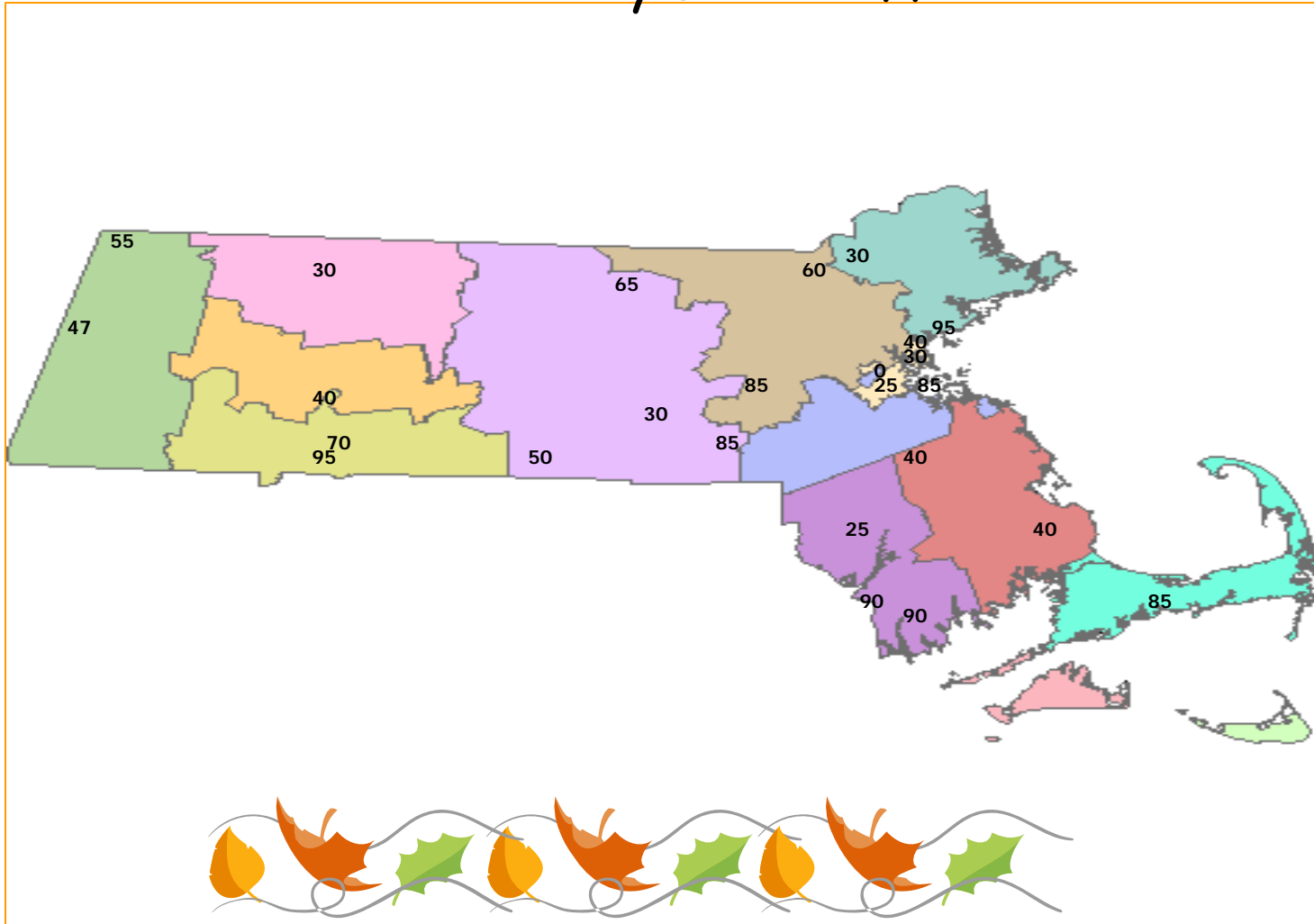


So What's Happening Today?

- Phone Interviews on the Increase
- Screen and Interview done at the same time
- Pilot Call Center offers modified 'on demand' phone interview for applications



Percentage of Telephone Interviews Statewide by Local Office



Boston Area Offices

Percent Telephonic Interviews

Office	Application	Recert
Boston Family Housing	0%	0%
Dudley Square	85%	85%
Malden	26%	22%
Newmarket Square	20%	50%
Revere	40%	40%

So How's It Going?

- **Case Manager Standpoint**
 - Caseloads too high to do anything else
 - Contact easier to make
 - Telephone appt letters useful
 - Shorter interview time
 - Still concerns about case accuracy



So How's It Going?

- Operational Standpoint
 - More successful first contact
 - Less need to send Notice of Missed Interview
 - Less denials for failure to complete application process (i.e., be interviewed)
 - Less need to reprocess applications for those denied.



FFY 2007 Error Analysis

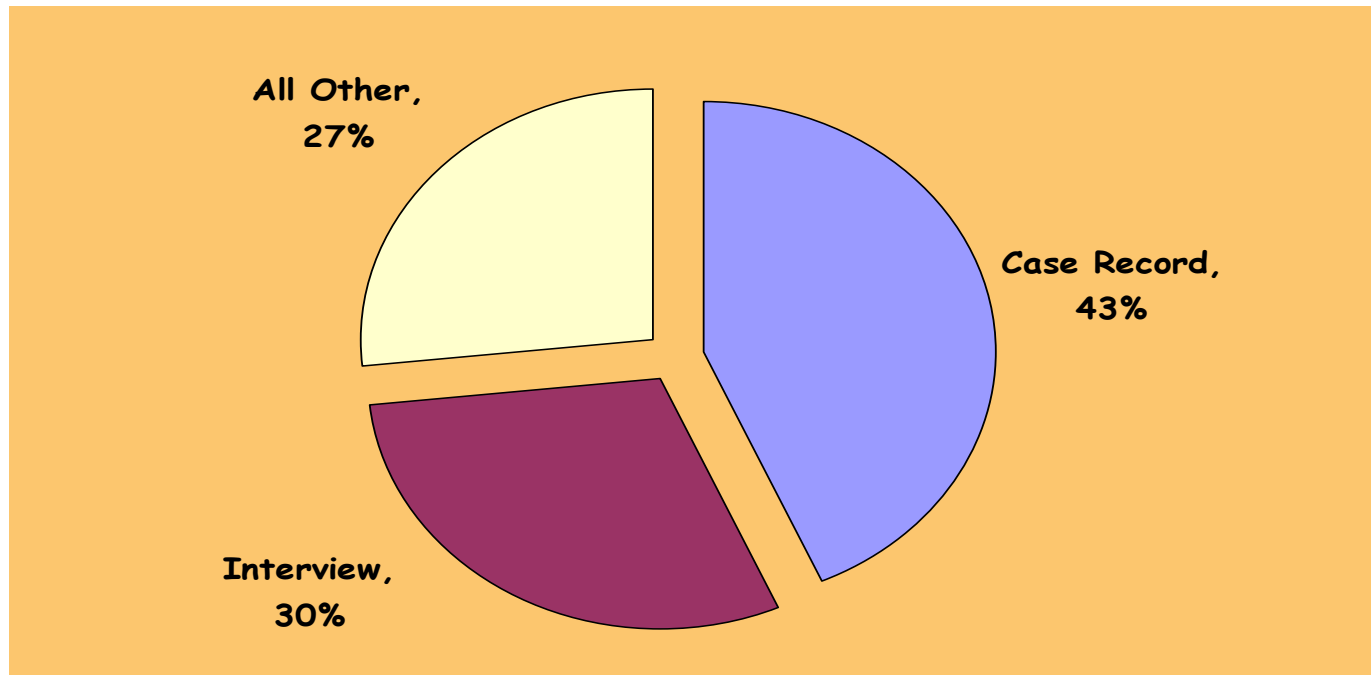
Agency Caused Errors	52%
Policy Incorrectly Applied	22%
Reported Information Disregarded	14%
Failed to Follow-up on Inconsistent Information	8%
All Other	8%
Client Caused	48%
Information Not Reported	44%
Other	4%

FFY 2007 Error Analysis

- NPA cases with telephone interviews comprised almost $1/4$ of the cases reviewed. (247/1,033)
- NPA cases with telephone interviews comprised almost $1/2$ of the errors found. (2.0/4.2%)



How NPA Errors Were Identified



Reversing Trend??

- From May 2007 - April 2008, errors equally distributed between face-to face interviews and telephone interviews (50-50)



So How's It Going?

- QC's Take on This....
 - Face-to-face interviews are better -

BUT.....

Eligibility workers' biggest enemies:

- Large caseloads
- Lack of time

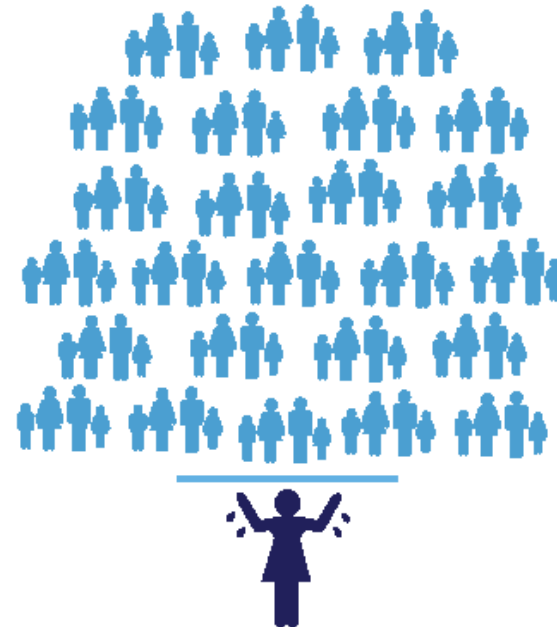


Food Stamp Caseload Per DTA Employee

 = 20 households receiving food stamps



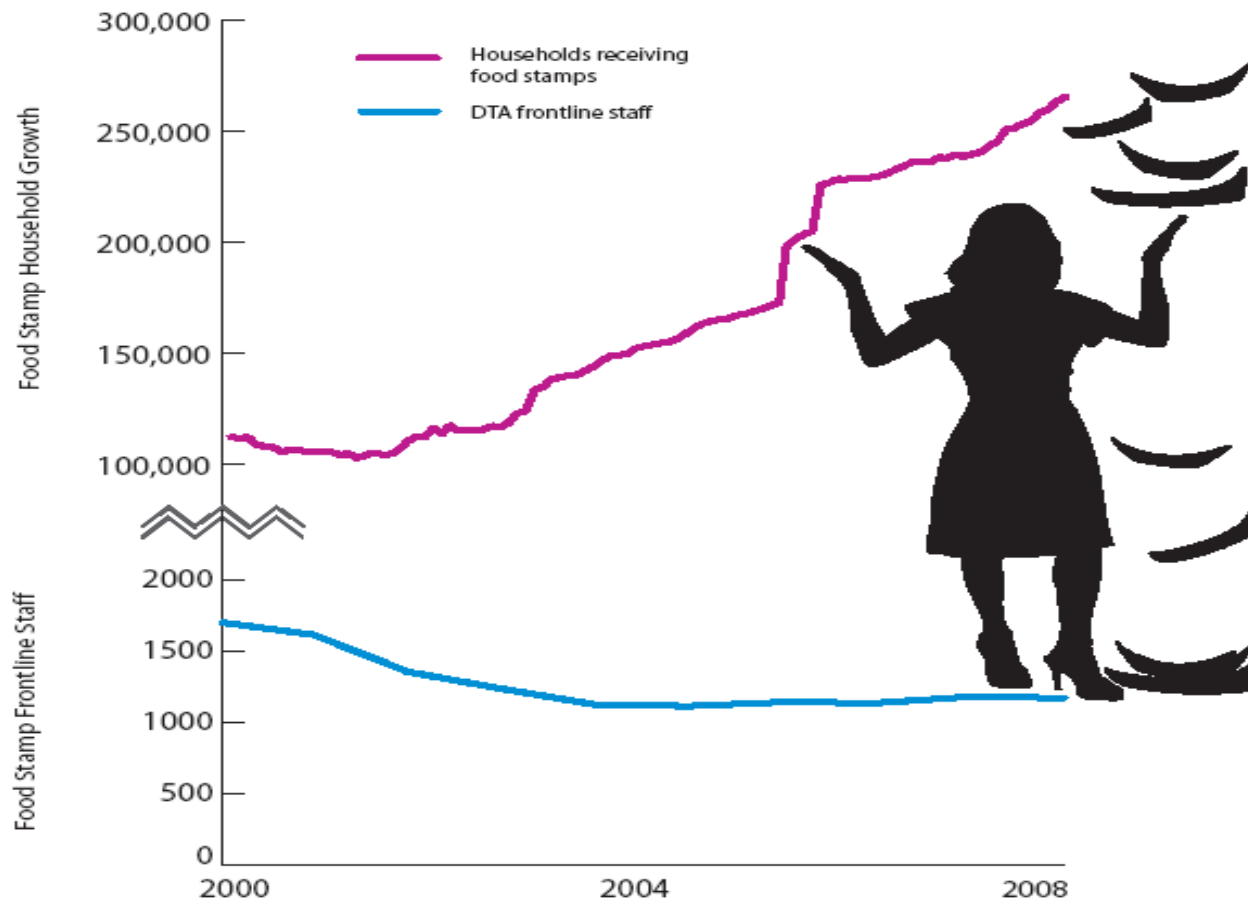
2002
Average Food Stamp-Only Caseload
280 Cases/Worker



2008
Average Food Stamp-Only Caseload
500+ Cases/Worker

Graphic created by the Massachusetts Law Reform Institute and The Hatcher Group, based on DTA Caseload/Worker Data, August 2008

Surging Food Stamp Caseload, DTA Staff Cutbacks Put Millions of Federal Nutrition Dollars at Risk



Graphic created by the Massachusetts Law Reform Institute and The Hatcher Group, based on DTA Caseload/Worker Data, August 2008

So, How to Make this Work?

- Identify potential barriers and resolve them
 - Operational issues?
 - Technical limitations?
 - Lack of training support?
 - Eligibility worker resistance?



So, How to Make this Work?

- Develop Implementation Plan
 - Market this baby
 - Prepare and train staff
 - Administrative and technical supports to facilitate the process (get that buy-in from the top)
 - Consider staggered implementation or phased-in approach
 - Supervisory sign-off/peer reviews

So, How to Make this Work?

- Monitor Closely

- Watch those errors
- Plan reinforcement training
- Bring in your error prevention strategies



Training Matters!

- Why?
 - Face-to-face interviewing skills not necessarily transferable
 - Loss of the visual is huge for some people
- Train interviewing skills and listening skills!
 - Role Play, Videos, Job Aids, Listening games, etc.



Remaining Challenges

- Antiquated phone systems
 - Caller ID issues
 - Anonymous call blocking
 - Voice mail issues
- Continued case manager resistance
- Need for more prefilled recertification forms
- Expand Call Center statewide



Questions?



More Information

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