

## INTERACTIVE INTERVIEW OBSERVATION CHECKLIST

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### ***Interview Purpose:***

- Food Stamp Application     Child Care Application     Family Healthcare Application  
 Temporary Assistance Application     Adult Medical Application     Other
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### ***Type of interview:***

- Face-to-face     Telephone
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### ***Interview Preparation:***

- Reviews IMES, case file & other information prior to interview  
 Identifies topics to be addressed during the interview

Comments:

Strengths:

Areas for Improvement:

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### ***Opening/Setting the Tone:***

- Introduces self/defines roles  
 Establishes rapport  
 Explains that information discussed is confidential  
 Asks customer to explain his/her situation  
 Explains the purpose of the interview  
 Introduces FAMIS & interactive interview process  
 Explains the eligibility determination process  
 Maintains open, friendly, businesslike tone

Comments:

Strengths:

Areas for Improvement:

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**Exhibit I**

***Body of Interview (General/Technical):***

- Turns the monitor to allow customer to view the screen after establishing/locating supercase (ensures confidentiality is not breached)
- Explains customer rights & responsibilities, including disclosure of Social Security Numbers and citizenship and immigration status
- Explains program eligibility requirements
- Phrases questions and responses using language easily understood by the customer (avoids jargon, etc.)
- Asks clarifying questions throughout the interview
- Enters information into FAMIS without altering the customer's statement
- Reviews application request and obtains applicant's signature before entering the controlled flow
- Discusses needed verification with customer and offers assistance in obtaining required documentation
- Reviews all information in the Interview Summary and corrects errors prior to obtaining applicant's signature
- Obtains applicant's signature before exiting the controlled flow
- Offers applicant a copy of the interview summary
- Reviews and provides a copy of Request for Information, discussing outstanding verification
- Prints and obtains necessary signatures on verification forms
- Reviews budget information with customer
- Discusses case/application status with customer
- Explains benefit delivery/EBT and/or Managed Care
- Offers voter registration

Comments:

Strengths:

Areas for Improvement:

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***Body of Interview (Specific Areas):***

**Supercase Members**

- Explores members of the household and correctly establishes Supercase
- Explores anticipated changes in household composition

**Eligibility Unit Members**

- Explores and correctly determines Eligibility Unit Composition
- Explores anticipated changes in Eligibility Unit Composition

## Resources

- Uses language easily understood by customer to gather resource information
- Reviews resource information with customer to determine:
  - Who owns each resource
  - Whether resources have changed since last contact
  - Expected/predicted changes using the past 30 days resource information
- Accurately enters all resource information provided by customer
- Enters appropriate verification codes into FAMIS
- Enters comments to support entries/decisions when necessary
- Correctly applies policies regarding resources

## Income and Work History

- Evaluates and explores information displayed on the Interface screen
- Explores work history for all potentially employed EU members
- Explores/identifies potential earned and unearned income
- Reviews income information with customer to determine:
  - Expected/predicted changes, using the past 30 days' income information
  - Whether anyone has started/ended a job in the past 30 days
  - If income includes overtime, bonuses, etc. not expected to continue
  - Budget months required
  - Appropriate calculation method
  - Frequency of pay
  - Income amounts to be excluded/included in income calculation
- Asks probing/follow-up questions when appropriate
- Enters appropriate verification codes into FAMIS
- Enters comments to support FAMIS entries and document income discussion
- Correctly applies policy regarding budgeting earned/unearned income
- Reviews income information captured in FAMIS with customer

## Deductions

- Explores all potential deductions from income
- Asks questions about deductions using language easily understood
- Reviews deductions with customer to determine:
  - Who is responsible for the expense
  - For whom the expense is incurred
  - Expected/predicted changes using the past 30 days' expense information
- Enters appropriate verification codes into FAMIS
- Enters comments to support FAMIS entries and discussion of deductions
- Correctly applies policy regarding allowable deductions

### **Supercase Eligibility Unit Summary Screen**

- Evaluates accuracy of FAMIS eligibility recommendations

### **Referrals/Other Types of Assistance**

- Explores potential eligibility for other assistance programs
- Explains/initiates referrals or application for other assistance

### **Management**

- Explores past, present and future management
- Considers circumstances when exploring management
- Was customer's explanation feasible?  Yes  No

**Comments:**

**Strengths:**

**Areas for Improvement:**

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### **Closing of Interview**

- Reviews actions required of the customer (reviews information needed to complete an eligibility determination)
- Reviews actions required of the worker (reviews information the worker will assist customer in obtaining)
- Reviews change reporting requirements using language easily understood
- Provides customer with information on how to contact worker
- Explains hearing rights and appeals process
- Provides appropriate informational pamphlets (IM-4)
- Ends interview on a positive note

Comments:

Strengths:

Areas for Improvement:

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**Overall Interviewing Techniques**

- Responds to verbal and non-verbal cues
- Speaks clearly and effectively
- Uses good non-verbal behavior (good eye contact, body language)
- Focuses attention on the customer
- Maintains non-judgmental, courteous behavior
- Uses paraphrasing to clarify customer's statements
- Uses effective listening skills
- Did not alter client's statement when recording information in FAMIS
- Enters appropriate verification codes and comments, when needed

Comments:

Strengths:

Areas for Improvement:

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**ADDITIONAL COMMENTS:**

Customer Service:

Accuracy:

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*Use the information gathered to provide helpful feedback to the worker. The last page of this document provides for a summary of the observation.*

**FAMIS INTERACTIVE INTERVIEW FEEDBACK**

Worker name: \_\_\_\_\_

Date of Observation: \_\_\_\_\_

**Interview Purpose:**

- Food Stamp Application     Child Care Application     Family Healthcare Application
- Temporary Assistance Application     Adult Medical Application     Other

**Type of interview:**     Face-to-face     Telephone

**Areas of Interview Worker Completed Successfully/Positively:**

- Interview Preparation
- Opening/Setting the tone
- Body of Interview (General/Technical)
- Body of Interview (Specific)
- Correct Eligibility Determination
- Closing of Interview
- Overall Interviewing Techniques

Comments: \_\_\_\_\_

**Areas of Interview Needing Improvement:**

- Interview Preparation
- Opening/Setting the tone
- Body of Interview (General/Technical)
- Body of Interview (Specific)
- Correct Eligibility Determination
- Closing of Interview
- Overall Interviewing Techniques

Comments: \_\_\_\_\_

Individual Action Plan for Worker: \_\_\_\_\_

Follow-Up Date: \_\_\_\_\_

Signature of Observer: \_\_\_\_\_

Signature of Worker: \_\_\_\_\_