**INTERACTIVE INTERVIEW OBSERVATION CHECKLIST**

**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

**Interview Preparation:**
- [ ] Reviews IMES, case file & other information prior to interview
- [ ] Identifies topics to be addressed during the interview

Comments:

Strengths:

Areas for Improvement:

**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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*IM Training & Development*  
*May 2008*
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:

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/uneearned 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:

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:
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: ____________________________________________________