Flexible Interview Scheduling: Five Models

1. Client Initiated Interviews (See examples from Humboldt, Santa Cruz, and Stanislaus Counties)

A customer calls the CWD contact center or specific CWD phone number when they are ready to interview. This is usually immediately after submitting an application or recertification through the online portal or via fax. Once connected, the CWD will either conduct the interview right away or schedule a convenient time. The CWD still sends the appointment letter when the interview is not completed right away.

This model is most often used in partnership with a community partner doing CalFresh Outreach. This model may include a special phone number just for these customers. It can work for both recertification and out-of-office intake interviews, including those that qualify for expedited service.

2. Interview Warm Calling (See examples from Humboldt and Stanislaus Counties)

When a new application or recertification is received by the CWD, a clerk or eligibility worker calls the customer with the goal of immediately transferring them to an eligibility worker for the interview, or to schedule an interview at a convenient time. For recertifications, this “warm call” process can also be used towards the end of the month to reach any customers that missed their interview (see the Stanislaus County’s model on page 14).

This model works well for recertifications and out-of-office intakes, including those that qualify for expedited service.

3. Interview Block Scheduling (See example from Stanislaus County)

The appointment letter offers the customer a window of time on a certain day (e.g., 2 hours starting at 10am) to call in for their interview. The block time staggers calls to keep queue times low. Customers can also call outside of the designated block of time if necessary. The implementing county found that most people call at the beginning of the block of time, so they stagger start times accordingly with case load (e.g., at the hour or half hour). If a customer does not call in to complete their interview, a Notice of Missed Interview (NOMI) is sent.

This model may work best for recertifications and out-of-office intakes that do not qualify for expedited service.

4. Ready to Interview (See examples from Marin, Santa Cruz, and Ventura Counties)

The appointment letter has an appointment time, but also includes language that the customer can call anytime during a 30-day window. The customer can contact the office at their convenience, or wait for the call from the eligibility worker at the stated appointment time.

This model may work best for recertifications and out-of-office intakes that do not qualify for expedited service.

5. One-Call Resolution Interview (See example from Stanislaus County)

Customers may call the county for non-interview needs such as reporting (e.g., change of address). If they call within 30 days of their recertification deadline, the county will offer to conduct the interview in addition to completing the other request the customer has called about.

This model works best for recertifications.

See the full report here: https://tinyurl.com/FlexInterviewATC