

14-Day Touchback Process Script

November 29, 2010

14-Day Touchback Process

1. Describe touchback process
2. Review three-week work search progress
3. Review other responsibilities progress
4. Prepare applicant for eligibility interview appointment
5. Summarize / close call

Process	Rationale	Suggested Script
1. If returning a call to a client wishing to proceed with 14-day touchback, query the client to ensure this is a convenient time to have the conversation.		<i>I am calling in response to your request for your 14-day touchback request. The process will take a few minutes, is this a convenient time to review?</i>
2. Describe 14-day touchback process	<p>Confirm applicant is contacting at the 14-day point. If contacting early, advise them of the date they <u>should</u> be reconnecting. Explain steps involved in touchback.</p> <p>MIS: Refer to date from PA file.</p>	<p>Note: The ministry must be proactive in identifying any immediate need. Any time an applicant's circumstances change, then the ministry should consider whether a reassessment is required.</p> <p><i>This is your 14-day touchback session for confirming that:</i></p> <ul style="list-style-type: none"> ➤ All adult applicants are continuing with their ministry directed work search ➤ All adult applicants have completed had the a ministry orientation session ➤ Review other responsibilities ➤ Complete Family Maintenance Questionnaire ➤ Prepare eligibility interview appointment (intake)

Process	Rationale	Suggested Script
<p>3. Review three-week work search progress</p>	<p>Review the results of the work search, as per the agreed upon activities on the PA HST screen.</p> <p>Use the Three-Week Work Search Review (SD3116) to assist you in determining a satisfactory work search.</p> <p>Advise that if not completed, it may result in delay or denial of an eligibility interview.</p> <p>Decide whether or not the work search is satisfactory. (Note: Consider if the applicant has a disability or other mitigating circumstances that may affect the work search.)</p> <p>ICM/MIS: Comment relevant details on the PA file.</p> <p>Note: Discuss the gaps in the work search activities and then instruct the applicant on what further activities are required in the final week to ensure that the three-week work search is satisfactory.</p> <p>Note: Worker to consider if applicant has any limitations which may impact an effective work search.</p>	<p><i>You may be scheduled for an eligibility interview once you have completed a satisfactory work search. You may be denied an interview if your work search is unsatisfactory. (Review progress to date.)</i></p> <p><u>If three-week work search is satisfactory:</u> <i>It appears that you have completed all of your work search activities as directed by the ministry. We can now schedule your eligibility interview appointment. In the meantime, you are still required to search for work. If you do not contact us or attend your appointment, we will assume that you no longer require assistance. If at anytime you would like to cancel your appointment, please advise us so we may schedule someone else in your place.</i></p> <p><u>If three-week work search is unsatisfactory, but an attempt has been made:</u> <i>Although you have completed some (many) of the activities on your three-week work search, you are not on track to complete all the required activities.</i></p> <p><i>Is there anything that affected your ability to complete the work search?</i></p> <p><u>If three-week work search is unsatisfactory and little to no attempt has been made (few or no activities completed):</u> <i>A satisfactory work search is required in order to proceed with an application for income assistance. Please explain why you were unable to complete the activities?</i></p>

Process	Rationale	Suggested Script
		(If explanation is unreasonable, advise applicant of the three-week work search requirement and reschedule a 14-day touch back session. Offer applicant a written decision and advise applicant of the right to reconsideration.)
4. Review other responsibilities progress	<p>If applicant was advised to access other income, ensure that appropriate steps have been taken.</p> <p>Review progress with obtaining documentation required for 2-Year Independence Rule.</p> <p>Ask if <u>Direct Deposit Request form SD2648</u> has been completed.</p> <p><u>Direct Deposits Benefits</u></p> <p><u>Direct Deposit Brochure</u></p> <p>ICM/MIS: Comment relevant details on the PA file.</p>	<p><u>If previously advised to access other income: Earlier in the process the need for you to apply for [other income source] was discussed. Can you please provide the status of your efforts to date?</u></p> <p><i>Did you have success obtaining documentation to prove that you meet the requirements of the 2-Year Independence Rule?</i></p> <p><i>Have you completed your Direct Deposit Request form?</i></p> <p>Note: If not, review benefits of direct deposit with applicant.</p>

Process	Rationale	Suggested Script
<p>5. Prepare applicant for eligibility interview (intake)</p>	<p>Explain upcoming eligibility interview process</p> <p>ICM/MIS: Comment relevant details on the PA file.</p> <p>Review some of the more commonly forgotten documents from the <u>Information / Documentation Checklist (SD3034)</u>.</p> <p>Ask any questions that have arisen out of 3rd Party Checks (Note: This is for information gathering purposes and not to make a final eligibility decision.) Client questions around eligibility should be deferred to the EAW completing the final interview.</p> <p>Book an eligibility interview – the PA file indicates the first date the applicant is eligible for an interview. Book an interview on, or the first available space after, that date.</p> <p>ICM/MIS: Comment relevant details on the PA file. Refer to PRE screen to establish date.</p>	<p><i>Please confirm that you intend to continue with an application appointment. (If no, exit process.)</i></p> <p><i>The purpose of eligibility interview appointment is to determine your eligibility for assistance. We will gather additional information and review documentation that you are required to submit at the time of the interview. Please be aware that any missing documentation may delay your application.</i></p> <p><i>In order to help you collect the information, I will explain some of the documents that will be required at that appointment. Any items that do apply to you are required for your eligibility interview, to enable the ministry to make an eligibility decision. (Review some commonly neglected items.) Some of these items may not apply to your situation.</i></p> <p><i>We have had various reports run since your last contact with us: Equifax, ICBC, BC Assessment Authority, Personal Property Registry, and Canada Revenue Agency. I now have some questions to clarify.....</i></p> <p><i>Your eligibility interview appointment will be on (Stage 2 appointment date from PA file indicates first date the applicant is eligible to have an appointment). Please try to arrive early for your appointment. If you are late, you may be forced to reschedule.</i></p>

Process	Rationale	Suggested Script
<p>6. Summarize / close call</p>	<p>Discuss service options with client (remote or face-to-face).</p>	<p><i>You have now completed the 14-day touch back session. In the meantime, please ensure you continue your work search. If you are still in need of assistance at the time of your scheduled eligibility interview, then please come fully prepared.</i></p> <p><i>If, in the meantime, your circumstances change and you have an immediate need for food, shelter or urgent medical attention, please come back and we will do a reassessment as to whether you must complete the rest of your three-week work search.</i></p> <p><i>You have the option to reach us by phone or in person for any future services.</i></p> <p><i>If you do not wish to attend the eligibility interview to complete your application process, we ask that you contact the ministry to cancel your appointment, so we can schedule someone else.</i></p>