

**NON-ASSISTANCE CALFRESH RENEWAL  
TELEPHONIC SIGNATURE SCRIPT (ENGLISH)**

**SECTION 1:**  
**INTRODUCTION**

Outgoing Renewal (RE) Calls		Incoming Renewal (RE) Calls
<p><b>Worker:</b> "Good morning/afternoon, may I please speak with [Customer's Name]?"</p> <p>"I am calling from the Department of Public Social Services to conduct your renewal interview."</p>		<p><b>Worker:</b> "Good morning/afternoon, Department of Public Social Services, this is [EW's name]. How may I help you?"</p> <p>If the customer is calling to complete his/her RE, proceed with the script.</p>
If...	Then...	
Customer is available	Proceed with the script.	
Customer is unavailable	Follow existing policy and procedures to leave a message and make 2 follow up calls.	

**Worker:** "Please be advised that this call will be recorded for training and quality assurance purposes. For security and confidentiality purposes please verify" **(any four identifiers):**

If speaking with an Authorized Representative (AR), verify the name of the AR with the case record and proceed with **authenticating the customer's PII.**

- your full name;
- your case number;
- the last 4 digits of your Social Security Number;
- your date of birth;
- your address on file;
- your phone number on file; or
- your e-mail.

**NOTE:** If the call drops at any time during the interview, contact and reauthenticate the customer/AR.

If...	Then...
Authenticated	Continue.
Not Authenticated	Do <b>NOT</b> provide any information to the caller. Have the caller call back when he/she has the information available. End the call. Journal the conversation outcome.

**SECTION 1:  
INTRODUCTION  
(cont.)**

**Worker:** "Thank you, the renewal process may take approximately 45 minutes. Are you available to complete your CalFresh Renewal?"

If...	Then...						
<b>YES</b>	Continue.						
<b>NO</b>	<p><b>Worker:</b> "Please note that even if we have not received your renewal application, we can complete your CalFresh Renewal over the phone by capturing your telephonic signature. A Telephonic Signature consists of recording your verbal consent/authorization to sign all necessary forms through this call. If you do not complete the process in a timely manner, your benefits may be impacted. Would you like to continue with your interview?"</p> <table> <tr> <th>If...</th><th>Then...</th></tr> <tr> <td><b>YES</b></td><td>Continue.</td></tr> <tr> <td><b>NO</b></td><td> <ul style="list-style-type: none"> <li>Reschedule the appointment (no later than the last day of the Due Month) if requested by the customer.</li> <li>Ensure to update the <b>Customer Schedule</b> page with <b>No Show</b> for CalSAWS to generate and send the <b>Notice of Missed Interview</b> (CF 386-NOMI).</li> <li>Ask and document in the CalSAWS <b>Journal</b> why the customer is not available to complete the RE and all actions taken.</li> <li>Inform the customer that he/she can contact the RE Line any time in the Due Month to complete the RE. End the call.</li> </ul> </td></tr> </table>	If...	Then...	<b>YES</b>	Continue.	<b>NO</b>	<ul style="list-style-type: none"> <li>Reschedule the appointment (no later than the last day of the Due Month) if requested by the customer.</li> <li>Ensure to update the <b>Customer Schedule</b> page with <b>No Show</b> for CalSAWS to generate and send the <b>Notice of Missed Interview</b> (CF 386-NOMI).</li> <li>Ask and document in the CalSAWS <b>Journal</b> why the customer is not available to complete the RE and all actions taken.</li> <li>Inform the customer that he/she can contact the RE Line any time in the Due Month to complete the RE. End the call.</li> </ul>
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**Worker:** "Great! Let's begin. Since you have not submitted your CalFresh Renewal, we will complete it over the phone so there will be no need to submit a physical or electronic application. We will complete your Renewal on your behalf using a telephonic signature. Would you like to continue?"

If...	Then...
<b>YES</b>	Go to <b>Section 2: Root Questions and Interview</b>
<b>NO</b>	<p><b>Worker:</b></p> <ul style="list-style-type: none"> <li>To continue CF eligibility, explain to the customer that he/she must submit a complete RE application by mail, fax, online, via telephone, drop-off box, or in person and complete the interview.</li> <li>Inform the customer he/she may call the RE Line at (424) 405-5909 or (888) 999-7671 Monday-Friday from 8am-5pm during the RE Due Month to complete the RE otherwise the case will discontinue.</li> <li>Ask the customer if he/she received the RE application. If not, offer to mail one.</li> <li>Offer to reschedule the RE interview appointment for a later date (<b>no later than the last day of the Due Month</b>).</li> <li>In the <b>Journal</b> page, ensure to include: <b>a)</b> customer was offered to complete the RE over the phone but unable to for the following reason(s) (state the reason(s)), <b>b)</b> the new date of the rescheduled appointment, and <b>c)</b> the RE Line number and days and hours to call were provided.</li> <li>End the call.</li> </ul>

## SECTION 2: ROOT QUESTIONS AND INTERVIEW

- From **Case Summary**, click the **Re-Evaluate** button to reset all the root questions.

CalFresh

Worker: Customer Service

Worker ID:

Program Status: Active

RE Due Month: 02/2024 **Re-Evaluate**

- Under the **Eligibility** tab, go to **Customer Information**.
- Under the **Non-Financial** section, click on **Root Questions**. Change the drop-down option to **Re-Evaluate** and click the **View** button.

Customer Information

Case Number:  Go

Person Search

Non Financial

Contact

**Root Questions**

Non-Financial Root Questions List

\*- Indicates required fields

Required Re-Evaluate View

CF 37 Re-Evaluate

1. Has anyone moved into or out of your home last reported? \*

2. Do you want to name someone to help you?

- Read all questions displayed and select **Yes** or **No** according to the customer's answers.
- Clarify any discrepancies with the customer.
- Click **Save and Continue**. CalSAWS will prompt you to all **Non-Financial** screens that need to be updated.
- Repeat the same steps with the **Root Questions** under the **Financial** section.

**NOTE:** Follow CF policy and procedures on how to complete a CF RE which requires a detail case review.

Proceed to **Section 3: Rights and Responsibilities**

## SECTION 3: RIGHTS AND RESPONSIBILITIES

**Worker:** "A copy of your rights and responsibilities was mailed to you along with the appointment letter. Did you receive the copy?"

If...	Then...
<b>YES</b>	<b>Worker:</b> "Great, I will now be playing an audio recording of your "Rights and Responsibilities". Please make sure to stay on the call until the end and I will reconnect with you after the recording to continue."
<b>NO</b>	<b>Worker:</b> "Another copy will be sent to you, but I will now be playing an audio recording of your "Rights and Responsibilities." Please make sure to stay on the call until the end and I will reconnect with you after the recording to continue."



**Worker:** "Do you have any questions about the Rights and Responsibilities?"

**Reminder:** Inform the customer of the Income Reporting Threshold (IRT) based on their HH size.

**NOTE:** Once you have answered all questions, proceed to **Section 4: Telephonic Signature**.

#### SECTION 4: TELEPHONIC SIGNATURE

Inform the customer you will now begin the Telephonic Signature recording.

**NOTE:** Please refer to **Section 6** in case the call drops before Telephonic Signature (TS) is captured.





**START** Recording the Telephonic Signature

**Worker:** "We will now record your verbal signature to complete this Renewal. Please simply answer **YES** or **NO** to the following questions.

Please be advised that the following applies to all customers that apply for CalFresh benefits in person, online, by mail, or over the telephone. The County will check your answers using information in state and federal electronic databases from the Internal Revenue Service (IRS), Social Security Administration (SSA), consumer reporting agencies, and other government agencies. If the information does not match, the County may ask you to send proof. By signing this application over the telephone, you certify under penalty of perjury that you understood and answered the questions correctly and completely to the best of your knowledge. Do you agree with these statements?"

If...	Then...						
<b>YES</b> →	<b>Worker:</b> "A signature over the phone has the same legal effect and is legally enforced in the same way as a written signature. Do you agree to a verbal signature?"						
<b>YES</b>	<table border="1"> <thead> <tr> <th>If...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td><b>Customer</b></td><td> <b>Worker:</b> "Please state your full legal name and last four digits of your social security number."   <b>NOTE:</b> If the customer does not have a social security number or does not wish to provide the last four numbers of the SSN, ask for another form of identifying information found on case record. </td></tr> <tr> <td><b>Authorized Representative</b></td><td> <b>Worker:</b> "Please state your and the customer's full legal name and last four digits of the customer's social security number."   <b>NOTE:</b> If the AR does not have the customer's social security number, ask for another form of identifying information of the person the AR is representing found on case record. </td></tr> </tbody> </table>	If...	Then...	<b>Customer</b>	<b>Worker:</b> "Please state your full legal name and last four digits of your social security number."  <b>NOTE:</b> If the customer does not have a social security number or does not wish to provide the last four numbers of the SSN, ask for another form of identifying information found on case record.	<b>Authorized Representative</b>	<b>Worker:</b> "Please state your and the customer's full legal name and last four digits of the customer's social security number."  <b>NOTE:</b> If the AR does not have the customer's social security number, ask for another form of identifying information of the person the AR is representing found on case record.
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"Thank you. Your CalFresh Renewal has now been signed and submitted on your behalf. Today's date is <b>MM/DD/YYYY</b> . Do you have any questions?"							
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<b>NO</b>	<b>STOP</b> the TS recording.						
<b>Worker:</b> "A copy of your completed renewal application can be mailed to you; however, it will also be available via the on-line portal. You may review the information, and if any changes are							

	<p>needed, please call the Renewal Line within 10 calendar days from today at (424) 405-5909 or (888) 999-7671 Monday-Friday from 8am-5pm. Would you like a copy to be mailed to you?"</p> <table border="1" data-bbox="589 205 1495 394"> <thead> <tr> <th>If...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>YES</td><td>Inform the caller a copy will be mailed to him/her (confirm the mailing address). Thank the caller. End the call.</td></tr> <tr> <td>NO</td><td>Thank the caller. End the call.</td></tr> </tbody> </table> <p>Proceed to <b>Section 5: How to Generate a SAWS 2 PLUS</b></p> <p><b>NO</b> Explain to the customer that the RE cannot be submitted without a physical, electronic, or telephonic signature. Inform the customer of the different methods of submitting a CF RE application based on existing policy and procedures.</p> <ul style="list-style-type: none"> <li>If the customer now agrees to a TS, follow the <a href="#">blue arrow</a> of <b>Section 4 Telephonic Signature</b>.</li> <li>If the customer still does not agree to TS, <b>STOP</b> the recording.</li> </ul> <p><b>NO</b> Ask the customer which part of the questions and statements he/she does not understand. Explain and address any issues or concerns. Continue by following the <a href="#">blue arrow</a> of <b>Section 4: Telephonic Signature</b>.</p>	If...	Then...	YES	Inform the caller a copy will be mailed to him/her (confirm the mailing address). Thank the caller. End the call.	NO	Thank the caller. End the call.
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<p><b>SECTION 5: HOW TO GENERATE SAWS 2 PLUS</b></p>	<ul style="list-style-type: none"> <li>Document all action(s) taken in the <b>Journal</b> page. <b>NOTE:</b> Ensure to include that the customer was informed to review and report any changes within 10 days to the RE Line.</li> <li>Run <b>EDBC</b> and have case authorized.</li> <li>Once authorized, generate the SAWS 2 PLUS under the <b>Template Repository</b>.</li> <li>In <b>Document Parameters</b>, select the <b>Program</b>, <b>Customer Name</b> and <b>Language</b> in the drop-down menus and click <b>Generate Form</b>.</li> </ul> <div data-bbox="393 1129 1474 1411">  <p>The screenshot shows the 'Document Parameters' form. It includes a 'Case Number' field with a 'Go' button. Below it are three dropdown menus: 'Program', 'Customer Name', and 'Language'. Each dropdown is highlighted with a red box. A red arrow points from the 'Generate Form' button at the bottom to the 'Program' dropdown. The 'Generate Form' button is also highlighted with a red box. There are also 'Generate Blank Template' and 'Cancel' buttons.</p> </div> <ul style="list-style-type: none"> <li>Review the SAWS 2 PLUS and ensure it reflects the information updated in CalSAWS based on answers provided during the interview.</li> <li>Click on <b>Print Locally</b> with Print Reason <b>Print For Participant</b>. <b>NOTE:</b> If copy is <b>not</b> requested, click on <b>Print For Case Record</b>.</li> <li>Click on <b>Add text</b> at the top of the page and type "<b>Telephonic Signature Captured</b>" on the <u>Signature</u> line and the date when the TS was captured.</li> <li>Click on the <b>Print</b> icon .</li> </ul> <p><b>NOTE:</b> Mail the copy of the SAWS 2 PLUS to the customer. The completed SAWS 2 PLUS will also be available in the <b>Distributed Document List</b>.</p>						

**SECTION 6: IF  
CALL DROPS  
BEFORE  
TELEPHONIC  
SIGNATURE IS  
CAPTURED**

If...	Then...						
The call is prior to interview date and time	<p>Make <b>two</b> attempts within 3–5-minute intervals</p> <table> <tr> <th>If...</th><th>Then...</th></tr> <tr> <td><b>Successful</b></td><td> <ul style="list-style-type: none"> <li>Authenticate customer (Refer to <b>Section 1</b>)</li> <li>Start <b>Section 4: Telephonic Signature</b>.</li> </ul> </td></tr> <tr> <td><b>Unsuccessful</b></td><td> <p><b>First Call:</b> "Hello, my name is (state the EW's name), and I am calling from the Los Angeles County Department of Public Social Services. This message is for (state applicant's full name). I am calling regarding your renewal interview. Unfortunately, the call was disconnected during our conversation. We can finalize your interview over the phone today. I will make another attempt to contact you in three to five minutes. Thank you."</p> <p><b>Second Call:</b> "Hello, my name is (state EW's name), and I am calling from the Los Angeles County Department of Public Social Services. This message is for (state applicant's full name). This is my second attempt to reach you regarding your renewal interview. This is to let you know that you have an appointment on (state date and time) to complete your renewal interview. If you wish to complete it sooner than the appointment date and time, please call back at your earliest convenience at (424) 405-5909 or (888) 999-7671 Monday-Friday from 8am-5pm to complete your interview to keep your benefits. Thank you."</p> <p><b>Worker:</b> Ensure to keep the original future interview appointment date and time and <b>journal all actions taken</b>.</p> </td></tr> </table>	If...	Then...	<b>Successful</b>	<ul style="list-style-type: none"> <li>Authenticate customer (Refer to <b>Section 1</b>)</li> <li>Start <b>Section 4: Telephonic Signature</b>.</li> </ul>	<b>Unsuccessful</b>	<p><b>First Call:</b> "Hello, my name is (state the EW's name), and I am calling from the Los Angeles County Department of Public Social Services. This message is for (state applicant's full name). I am calling regarding your renewal interview. Unfortunately, the call was disconnected during our conversation. We can finalize your interview over the phone today. I will make another attempt to contact you in three to five minutes. Thank you."</p> <p><b>Second Call:</b> "Hello, my name is (state EW's name), and I am calling from the Los Angeles County Department of Public Social Services. This message is for (state applicant's full name). This is my second attempt to reach you regarding your renewal interview. This is to let you know that you have an appointment on (state date and time) to complete your renewal interview. If you wish to complete it sooner than the appointment date and time, please call back at your earliest convenience at (424) 405-5909 or (888) 999-7671 Monday-Friday from 8am-5pm to complete your interview to keep your benefits. Thank you."</p> <p><b>Worker:</b> Ensure to keep the original future interview appointment date and time and <b>journal all actions taken</b>.</p>
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