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**Online Guide Transmittal 2025-12**
**March 27, 2025**

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| **To:** | **Department of Transitional Assistance Staff** |
| **From:** | **Sarah Stuart, Associate Commissioner for Local Implementation and Special Populations** |
| **Re:** | **Cross Programs: Updated Procedures for Performing Cold Calls** |

## Overview

Cold calls are important to both clients and the Department alike. By performing cold calls, staff can meet the needs of the clients we serve sooner and more efficiently, all while meeting agency goals and requirements.

Having an effective cold call process results in:

- timely benefit issuance to clients,
- timely expedited issuance,
- more efficient case processing,
- increased interviews held at the point of application,
- fewer application denials,
- fewer scheduled interviews, and
- reduced incoming calls and registrations for staff.

To ensure a consistent and systematic approach to performing cold calls, clearer guidelines have been developed which will streamline procedures. These steps have been developed with consideration of the best practices identified with staff who have a high rate of connecting with clients.

**Overview (Continued)**

The Department recognizes that cold call guidance is referenced in multiple pages in the Online Guide and will require extensive updates throughout the Online Guide to universally reflect these procedural changes on all applicable pages. **To issue these updates quickly to staff, the current cross program cold call guidance will be communicated through the *Conducting Cold Calls* page of the Cross Programs book in the Online Guide**. All additional Online Guide pages that reference cold call procedures will be updated on an ongoing basis to ensure they align with the most current policy and procedures.

**Purpose**

The purpose of this Online Guide Transmittal is to advise staff of updates to cold call procedures and transmit a new related Online Guide page.

**New Online Guide Page**

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| **Topic:** | Cross Programs |
| **Book:** | Cold Calls |
| **Page:** | Conducting Cold Calls |

**Questions**

If you have any policy or procedural questions, after conferring with the appropriate TAO personnel, please have your Systems Information Specialists or TAO management email them to DTA.Procedural Issues.

Systems issues should be directed to the Systems Support Help Desk.

# Conducting Cold Calls

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- Overview
- Clarified Cold Call Expectations
- Cold Calls at Application
- Cold Calls at Review
- Cold Call Expectations
- Cold Calls on Cases with Outstanding Verifications or Matches


## Overview (Back to Index)

Cold calls are helpful to clients and the Department because, when successful, they allow for:

- timely issuance of expedited/ongoing benefits,
- reduced number of scheduled interviews,
- reduced strain on the phone system and in-person services, fewer denied applications; and
- fewer unnecessary VC-1s and additional documents that need to be processed.

## Clarified Cold Call Expectations (Back to Index)

Cold calls serve as an alternative to a scheduled appointment and the potential issuance of a VC-1.

This is a critical step that must be taken before an appointment is scheduled for an application, reevaluation, and/or recertification interview (if not waived in certain situations). It also must be done before a VC-1 is issued for unclear information or for an eligibility factor that can be self-declared. You must make cold calls during DTA's operating hours (7:00 a.m. to 7:00 p.m.). This includes during weekend overtime hours worked when offered.

Cold calls must be made to attempt to complete an interview when:

- entering a web application or RFA,
- processing a scanned or online recertification in which an interview is required,
- a client is within 45 days of their TAFDC/EAEDC reevaluation end date, and
- processing any action associated with an application or recertification that has an outstanding interview.

## Cold Calls at Application (Back to Index)

There are important steps that must be taken when conducting cold calls at the point of application:

1. Complete the web application or RFA workflow.
2. Determine if interpreter services are needed and if so, make the cold call through interpreter services, if not then make a cold call directly to the client.
3. If you reach the client, and they are able, complete the interview.
4. If you get a voice mail, leave the following message:

   *This is the Department of Transitional Assistance calling regarding your application, we will be calling back in the next minute or so to complete your interview. If you are available, please pick-up. If we do not reach you, we will send you an appointment for an interview. To complete the interview earlier, you can call the Assistance Line at 877-382-2363 (or your case manager at XXX-XXX-XXXX). Thank you.*
5. Wait approximately 30 seconds to one minute and call the client back. If you reach them, advise them to disregard the voice message you just left and if they are able, complete the interview.
6. If they are not, hang up, since you have already left a message explaining the process.
7. Indicate that a cold call attempt was made by checking the *Perform Cold Call* checkbox on the Phone page and select the Yes or No radio button in the client answered section.
8. Schedule an appointment for an interview.
9. Enter a detailed narrative explaining the action you took on the case.
10. Exit the case.

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| **Important** | You must exit the case without continuing to any additional pages or matches in BEACON. This step is important in decreasing the amount of time spent reviewing applications, as well as ensuring the workflow is intact for the case manager who completes the interview. |

## Cold Calls at Review (Back to Index)

There are important steps that must be taken when conducting cold calls at points of review. You must:

1. Review the submitted document to verify if there is an updated phone number reported. If no updated phone number is reported, attempt to reach the client via telephone using the phone number listed on the Phone page in BEACO.

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| **Note** | When conducting cold calls, as is the case with every client contact, if the client has Limited English Proficiency (LEP), interpreter services **must** be offered. Always review the submitted documents and BEACON history prior to placing a call to determine whether the client has expressed a language preference and call with an interpreter if appropriate. If you do not learn of the need for an interpreter in advance, put the client on hold and conference in an interpreter. See Interpreter Services ? |

2. If the cold call attempt is successful, conduct the interview (if one is required) and complete as many of the workflow steps as possible, or clarify any unclear information or outstanding issues on the case.
3. If the first cold call attempt is not successful, leave the following message:

   *This is the Department of Transitional Assistance calling regarding your Recertification, we will be calling back in the next minute or so to complete your interview. If you are available, please pick-up. If we do not reach you, we will send you an appointment for an interview. To complete the interview earlier, you can call the Assistance Line at 877-382-2363 (or your case manager at XXX-XXX-XXXX). Thank you.*
4. Attempt another cold call in approximately 30 seconds to one minute of the first call. If you reach them, advise them to disregard the voice message you just left and if they are able, complete the interview. If the second attempt is unsuccessful, hang up since you have already left a message explaining the process.
5. Schedule an appointment and/or issue a VC-1 (if appropriate) using the best option available for the case situation.
6. Indicate that a cold call attempt was made by checking the Perform Cold Call checkbox on the Phone page.
7. Indicate whether the cold call attempt was successful by selecting either the Yes or No radio button in the Client answered section of the Phone page and select the Yes or No radio button in the client answered section.
8. Enter a detailed narrative explaining the actions you took on the case.
9. Exit the case.

## Cold Call Expectations (Back to Index)

Cold calls prevent the need to send a *Verification Checklist* (VC-1) if something that is unclear can be verbally clarified, as well as reduce calls to the Assistance Line, TAO main phone line, and Case Managers when what is provided is incomplete, unreadable, or inadequate. You must make cold calls during DTA operating hours (7:00 a.m. to 7:00 p.m.). This includes during weekend overtime hours worked when offered.

Cold calls must be made in relation to outstanding verifications and matches when:

- processing a recertification or interim report in which the interview can be waived, but there are outstanding verifications,
- processing documents that are inadequate, unreadable, unclear, or are not all that is required to process the case,
- processing any action associated with a case where the only outstanding item(s) can be self-declared, and
- processing matches where clarification is needed or a self-declared can be accepted.

## Cold Calls on Cases with Outstanding Verifications or Matches (Back to Index)

There are important steps that must be taken when making cold calls on cases with outstanding verifications or matches:

1. Determine if interpreter services are needed and if so, make the cold call through interpreter services, if not then make a cold call directly to the client.
2. If you reach the client, and they are able, clarify what is missing or needs clarification, and take any self-declarations using the telephonic signature.
3. If you get voice mail, leave the following message:

   *This is the Department of Transitional Assistance calling regarding (verifications that are missing, need clarification…), we will be calling back in the next minute or so to speak with you to clarify what is needed. If you are available, please pick-up. If we do not reach you, (explain specifically what is needed, by when and what to expect from the process (another VC-1 an inadequate notice, a match notice…)). If you have any questions, you can call the Assistance Line at 877-382-2363 (or your case manager at XXX-XXX-XXXX). Thank you.*
4. Wait approximately 30 seconds to one minute and call the client back. If you reach them, advise them to disregard the voice message you just left, clarify what is needed, and take any self-declarations using the telephonic signature line.
5. If they are not available, hang up, since you have already left a message explaining the process.
6. Indicate that a cold call attempt was made by checking the *Perform Cold Call* checkbox on the Phone page and select the Yes or No radio button in the client answered section.
7. If applicable, issue another VC-1 or an inadequate notice, using the best option available for the case situation.
8. Enter a detailed narrative explaining the action you took as well as specifically what is needed from the client.
9. Exit the case.