The Daily Blurb

Phone Etiquette – Part I

When you are on the phone queue you are the contact point for our clients and are therefore the face of DTA. To ensure that we maintain the proper level of courtesy and professionalism the department expects that the following things be done at the opening of any call in the phone queue:

Call opening for Case Manager

- Identify DTA at the beginning of every call.
- Identify yourself by first and last name at the beginning of every call.*
  For example: "*Good morning, you have reached the Department of Transitional Assistance, my name is Jane Doe, how may I help you?*"

* If you have a special circumstance in which you are not comfortable providing your last name, please see TAO management to discuss the matter.

Confirming Identity

- Prior to assisting the caller, advise that information has to be verified for security purposes.
- Ask the caller their first and last name.
- Ask for the caller's AP ID number or Social Security Number.
  - ✓ If AP ID is given, confirm the last four digits of the caller's social security number.
- Ask for date of birth.
- Confirm that the telephone number and address in BEACON is still current for the client.
- Ask if the telephone number they provided is the best number to call in case you get cut off.

Next installment, we will discuss Part II of the call: Identifying the Reason for the Call and Researching for Resolution.

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Anatomy of a Call, Part II

Identifying the Reason and Creating Solutions

In the last Blurb we discussed opening up the call and verifying the identity of the client we are speaking to. Now, let's focus on some quick points regarding the second phase of the conversation: research, action plan, and closing.

Identify and confirm reason for calling.

- Identify the reason for the call and repeat the question back to the caller.
- Ask detailed questions to clarify best next steps for the call.
- Note any accommodations in the case file and any that you notice as the call progresses. When appropriate, transfer the call to a specialist.
- If someone is better able to help the caller, transfer the call to the most appropriate person.

- **Research and Resolution**
  - Communicate that they have located an opportunity for resolution and convey the steps needed to reach that resolution.
  - Tell the caller how s/he can make the client experience even more efficient next time.
  - Provide accurate information. If you do not know the answer to a caller's questions, take the time to ask or look up the information.
  - Make sure to take all actions required of the case during the call. For example look for any unprocessed documents and take the appropriate action(s); conduct an interview if required, etc.

- **Efficiency**
  - Ask caller if their issue was answered / resolved.
  - Tell the caller their recertification or application status.
  - Tell the caller if his/her case is up to date.
  - Annotate the call and the resolution in a detailed BEACON narrative. Be sure to tell the caller you are annotating the call in their case record.

- **Closing**
  - Use "DTA" in your closing.
  - Use the caller's name in the closing.
  - Ask the caller if they have any other questions or things you can help with.