



VIRGINIA DEPARTMENT OF  
SOCIAL SERVICES

# Threading the Needle: Weaving Interviews and Documentation into Seamless Service

Fall 2025 BPRO Conference



What if every interview and every document could be part of the same thread—woven together in real time to create a stronger, faster, and more accurate safety net? In this interactive workshop, we'll explore how integrating interviews with immediate documentation can eliminate duplication, boost accuracy, and improve timeliness in processing.

Discover how this best practice transforms workflows, enhances collaboration, and supports clients more effectively. Join us as we stitch together strategies that make our work not just more efficient—but more impactful.

This session is designed for both new and experienced Benefit Program Specialists—whether your focus is SNAP, TANF, or both—who are looking to strengthen their skills in Interactive Interviewing and documentation. While Medical Assistance, Child Care, VIEW, SNAP E&T, or Energy Assistance will not specifically be addressed, many of the best practices shared may be applicable across all Benefit Programs.



# Brought to you by:

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**TANF/VIEW-Christie Bruce, TANF/VIEW Program Consultant Sr.  
SNAP-Deana Bennett, Innovation Consultant**



# Welcome and Objectives

## **Interactive Interviewing: How to get the best information from your client**

- Efficient
- Complete
- Collaborative

## **Documentation:**

- Thorough
- Anyone reading it can understand
- Validates decisions made

# Ice Breaker

If you were a Troll, what would your name be?

## How to Find Your Whimsical Troll Name!

**1. Find the first letter of your first name in the chart.**

This gives you your **first troll name**.

**2. Find the first letter of your last name in the chart.**

This gives you your **second troll name**.

**3. Put them together** to reveal your magical troll identity!

# If you were a Troll, what would your name be?



Our Troll's name for this workshop is **Harmony Sparkleweave:**

- **Harmony:** She brings people together, just like the Trolls uniting their tribes.
- **Sparkle:** She adds creativity and fun to everything she does.
- **Weave:** A nod to our “Woven Together” theme — she helps connect ideas, people, and purpose.

# Ice Breaker Whimsical Troll Name Chart (A-Z)

Letter	Troll First Name	Troll Last Name
<b>A</b>	Appletwist	Snickledoodle
<b>B</b>	Dazzleberry	Tuffletuft
<b>C</b>	Crumpetwhirl	Gigglewhisk
<b>D</b>	Dandyfluff	Nibblenoggin
<b>E</b>	Elfwhistle	Jinglejam
<b>F</b>	Fluffernog	Wobblewink
<b>G</b>	Gigglegrin	Puddlelop
<b>H</b>	Hiccuptwig	Zizzlezip
<b>I</b>	Iggleplum	Tinkletuft
<b>J</b>	Jingletoes	Muddlewhirl
<b>K</b>	Kipperwhim	Snugglepuff
<b>L</b>	Lollibug	Quibblequack
<b>M</b>	Muddlewink	Fizzlefuzz

Letter	Troll First Name	Troll Last Name
<b>N</b>	Nibblenog	Jamboreejoy
<b>O</b>	Oodlesniff	Twinkletuft
<b>P</b>	Puddlewhisk	Glimmergrin
<b>Q</b>	Quibblequack	Dazzledot
<b>R</b>	Razzleflit	Tootletrick
<b>S</b>	Snickerblossom	Whimsywhirl
<b>T</b>	Tiddlewink	Zanyzap
<b>U</b>	Umbleberry	Crinklechirp
<b>V</b>	Vibbletwist	Jigglenog
<b>W</b>	Wobblewhimsy	Nuzzleknob
<b>X</b>	Xigglepuff	Tootsnip
<b>Y</b>	Yibbletuff	Fizzlenip
<b>Z</b>	Zizzlepop	Mirthmuddle

# Interactive Interviewing Process

Pre-Interactive  
Interview  
Preparation

Conducting the  
Interactive  
Interview

Post Interview  
responsibilities

# Before the Interactive Interview

## Review

- Case information and system inquiries
- Verifications

## Preparation

- Make notes of clarification needed
- Prepare your surroundings for interviewing
- VaCMS ready to begin interactive interview.



# Application Review & Screening

## Review

- Is application valid?
- Who's on the application?
- Programs requested?
- Preferred language?
- Receiving current benefits?
- Social Security numbers?
- Expedited screening completed?

## Individual Search

- By name or SSN if available.
- Ensure proper case association

Department of Social Services  
**APPLICATION FOR BENEFITS**

\_\_\_\_\_ County/City DSS

**A. APPLICANT INFORMATION**  
Your Contact Information

\_\_\_\_\_  
**Your Name** (last, first, middle initial)

\_\_\_\_\_  
**Your Street Address** (include apartment number) **City, State, ZIP**

\_\_\_\_\_  
**Your Mailing Address** (if different from your street address) **City, State, ZIP**

\_\_\_\_\_  
**In what city or county do you live?** **Email Address**

\_\_\_\_\_  
**Primary Telephone Number** **Alternate Telephone Number**

**What is the primary language spoken in your household?**

<input type="checkbox"/> English	<input type="checkbox"/> Vietnamese	<input type="checkbox"/> Laotian	<input type="checkbox"/> Somali	<input type="checkbox"/> French	<input type="checkbox"/> Other (specify): _____
<input type="checkbox"/> Spanish	<input type="checkbox"/> Farsi	<input type="checkbox"/> Chinese	<input type="checkbox"/> Kurdish	<input type="checkbox"/> German	
<input type="checkbox"/> Cambodian	<input type="checkbox"/> Haitian-Creole	<input type="checkbox"/> Korean	<input type="checkbox"/> Arabic	<input type="checkbox"/> Japanese	

# Front End System Searches

## Systems

- APECS (Child support paid/received)
- eDRS (Disqualified recipients, IPV)
- SVES (Death Match, Prisoner Match, Social Security Number Match, Unearned Income through SSA, Work Credits)
- VEC (Earnings, Unemployment Benefits)\*
- Virginia Lottery
- DMV\*

\*See Broadcast date 7/17/2025 titled VEC/VRI/DMV Usage and Storage



# The Interactive Interview

## Planning

- Interactive Interview
- Address gaps on the application
- Start with the same baseline questions

## Starting

- Introduce yourself and reason for call
- Confirm identity
- Remind the client to ask questions
- Let the client know how you are going to document your conversation.



# The Interactive Interview

Use a standard greeting  
Discuss:

- Rights & Responsibilities
- Basic program procedures
- Options available
- IEVS & computer searches
- Claims
- EBT and use of benefits



• Call at the scheduled time



• Smile when you talk to customers



• Listen and Never interrupt



• Keep customers informed



• Ask questions and take notes

See SNAP Guidance Part II pages 4-5 for completing a SNAP interview and 401.2 for TANF Interview

# Documentation

In the following slides, we will discuss some best practices for completing the Case Narrative within VACMS for SNAP and TANF.

Agency usage of documentation guides should be inclusive of the recommendations in the following slides.

**Case Narrative**

**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other

**Source:**  **Contact Date:**

**Program:** \*  SNAP  Medicaid  TANF  Child Care  
 EAP Fuel  EAP Cooling  EAP Crisis  VIEW  
 SNAPET  PEBT

- Household (0)
- Non-Financial (0)
- Income (0)
- Expenses (0)
- ESP (0)
- Enrollment/Vendor (0)
- Resources (0)
- Other (2)

# Case Example:

Poppy, applicant, age 45

Branch, son, age 10

Viva, daughter age 5

Biggie, no relationship

Bridget, daughter, 19



Poppy applying for SNAP, TANF/VIEW for self, Branch, Viva and Bridget. She moved here from West Virginia and is currently working at DreamWorks Animation. Branch and Viva receive child support from their absent father. Bridget is a full-time student at Troll University. Poppy and Biggie split household bills.

# Household

- Intake / Renewal / Changes
  - Include T# if applicable, how it was received (paper, online, call center, client phone call, fax, email), and date
  - Results of screening /Hotline
- Applicable programs
- Date & Type of interview scheduled, if it was completed or missed (if missed, document whether a Missed Interview Notice was sent)
- Who does the application / renewal contain?
- Voter Registration

## Program Specific Notes:






- SNAP & TANF - Rights and Responsibilities
- SNAP - Screening results - Hotline Flyer
- TANF – Diversionary Assistance, Emergency Assistance, all TANF forms

### Case Narrative

**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other









**Source:**  **Contact Date:**

**Program:** \*  SNAP  Medicaid  TANF  Child Care  
 EAP Fuel  EAP Cooling  EAP Crisis  VIEW  
 SNAPET  PEBT

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-  [Household \(0\)](#)
-  [Non-Financial \(0\)](#)
-  [Income \(0\)](#)
-  [Expenses \(0\)](#)
-  [ESP \(0\)](#)
-  [Enrollment/Vendor \(0\)](#)
-  [Resources \(0\)](#)
-  [Other \(2\)](#)



## Household (3)

Program: SNAP, TANF | Source: Phone | Contact Date: 09-08-2025

Created On: 09-08-2025 | Worker: BRUCE, CHRISTIE

Worker contacted client via phone at scheduled appointment time. Client did not answer. Worker left voicemail and mailed Missed Interview Notice.



Program: SNAP, TANF | Source: In-Person | Contact Date: 09-04-2025

Created On: 09-08-2025 | Worker: BRUCE, CHRISTIE | Updated On: 09-08-2025 | Updated worker: BRUCE, CHRISTIE

Paper application for SNAP and TANF received 9/4/2025. Application screened as expedite for SNAP, registered, and telephone interview scheduled via phone call to client. Appointment set for 9/8/25 @ 9:00 a.m.

T14806319 - Appointment letter and Hotline Flyer mailed to client.



## Household (3)

Program: SNAP, TANF | Source: Phone | Contact Date: 09-09-2025

Created On: 09-09-2025 | Worker: BRUCE, CHRISTIE | Updated On: 09-19-2025 | Updated worker: BRUCE, CHRISTIE

Client called back on 9/9/25 and agreed to complete interview immediately. Application contains Jinglejam, Poppy 45F and her children, Jinglejam, Branch 10M Jinglejam, Viva 5F Jinglejam, Bridget 19F. Worker discussed Rights & Responsibilities, Diversionary Assistance, and Emergency Assistance. Client indicated she wants to apply for regular TANF. Discussed all TANF forms (Notice of Cooperation and Good Cause, Notice of Intentional Program Violations and Penalties, Notice of Personal Responsibility, and Do You Have a Disability?). Poppy agreed to cooperate with DCSE. She also indicated she is not disabled. Copies of all forms will be mailed for signatures. Client states she is already registered to vote. Poppy also reported she would like her friend, Biggie Zanyzap, to be her authorized representative, being able to assist her with paperwork and receive a card, as he will sometimes pick up her groceries when she is unable to get to the store.



# Non-Financial

- Assistance Unit (how you verified Identity, Citizenship/Alien Status, Relationship, DOB, SSN)
- Residency

## Program Specific Notes:






- TANF - Absent Parent / Putative Father, Household Composition / Living With, School Enrollment, Immunizations, 60-month clock / Prior TANF in another state
- SNAP - Living arrangement, purchase and prepare, disability, school status, excluded/disqualified HH members, Work Requirement - Explained/Exemptions, Clock adjustments, Regaining efforts, System Inquiries – \* eDRS, SVES, Lottery,\* NDNH

**Case Narrative**


**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other


**Source:**  **Contact Date:**


**Program:** \*  SNAP  Medicaid  TANF  Child Care  
 EAP Fuel  EAP Cooling  EAP Crisis  VIEW  
 SNAPET  PEBT


    


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 [Household \(0\)](#)


 [Non-Financial \(0\)](#)


 [Income \(0\)](#)

 [Expenses \(0\)](#)

 [ESP \(0\)](#)

 [Enrollment/Vendor \(0\)](#)

 [Resources \(0\)](#)

 [Other \(2\)](#)

## Non-Financial (1)

Program: SNAP, TANF | Source: Phone | Contact Date: 09-09-2025  
Created On: 09-09-2025 | Worker: BRUCE, CHRISTIE

Household contains Jinglejam, Poppy 45F Jinglejam, Branch 10M Jinglejam, Viva 5F Jinglejam, Bridget 19F, and Biggie Zanyzap. Poppy reports that Jinglejam, Bridget 19F attends Troll Ville University full time and only comes home on holiday breaks. Worker explains ineligible student policy.

All system inquiries completed (eDRS, SVES, Lottery, NDNH, APECS) and results uploaded to DMIS.

Poppy also explained that she and her children cook and eat separately from Biggie, who is her sister's father-in-law's cousin. They share household bills but are each responsible for their own food. Per DMV inquiry, ID and residence is verified for Poppy. She also provided birth certificates for herself and children at the time of application to verify citizenship, relationship, and DOB. Poppy reports Branch and Viva are both up to date on immunizations and enrolled in school, pending verification. She also provided information about their absent father, Creek Jinglejam, to be referred to DCSE. Paternity was established at birth and he is listed on the BCs for the children.

Poppy reports that she previously received SNAP only in WV, but the case closed in October 2024. States she has never received TANF before. She emailed a copy of Closure Notice during the interview.

# Income

Any income reported on application / renewal/redetermination, interim report or changes reported by the client, as applicable

## Earned Income

- Document employer name, rate of pay, frequency of pay, date of first pay if new job, how verified, any discrepancies or excluded income, date & gross amount of final pay if terminated. If Self-employment, capture income and allowable expenses & how verified.

## Unearned Income

- Document type of income, frequency of pay, amount of pay, how verified, any discrepancies or excluded income

Document all system searches completed (EV, VEC /VRI, APECS, Work Number, SOLQ, SVES), as well as results.

**Case Narrative**

**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other

**Source:**  **Contact Date:**

**Program:** \*  SNAP  Medicaid  TANF  Child Care  
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 SNAPET  PEBT

- Household (0)
- Non-Financial (0)
- Income (0)
- Expenses (0)
- ESP (0)
- Enrollment/Vendor (0)
- Resources (0)
- Other (2)

## Income (1)

Program: SNAP, TANF | Source: Phone | Contact Date: 09-09-2025

Created On: 09-09-2025 | Worker: BRUCE, CHRISTIE | Updated On: 09-09-2025 Updated worker: BRUCE, CHRISTIE

All system inquires completed (VEC, APECS, EV in system). No results showing in VEC or APECS. Jinglejam, Poppy 45F reports she recently started working at DreamWorks Animation, first day 8/6/25. She works between 7-8 hours per week and earns \$15.50/hour. She is paid biweekly. First pay received 8/14/25, which client states is not reflective of her ongoing pay as she was in training. Income from 8/14/25 and 8/28/25 verified by EV. 8/14/25 will not be used as it reflects when Poppy was in training and is not a full pay.

Jinglejam, Branch 10M and Jinglejam, Viva 5F each receive \$25/month child support. C/s this is an agreement between herself and Creek, and did not go through DCSE. PV statement from Creek. No other income reported or found in EV or other system searches.



# Expenses

Enter all expenses reported by client.

- SNAP

- Shelter/Utility
- Dependent care
- Child Support deductions
- Medical expenses for disabled or elderly

**\*Not Required for TANF**

**Case Narrative**

**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other

**Source:**  **Contact Date:**

**Program:** \*  SNAP  Medicaid  TANF  Child Care  
 EAP Fuel  EAP Cooling  EAP Crisis  VIEW  
 SNAPET  PEBT

- Household (0)
- Non-Financial (0)
- Income (0)
- Expenses (0)
- ESP (0)
- Enrollment/Vendor (0)
- Resources (0)
- Other (2)

## Expenses (1)

Program: SNAP | Source: Phone | Contact Date: 09-09-2025

Created On: 09-09-2025 | Worker: BRUCE, CHRISTIE

Jinglejam, Poppy 45F pays for afterschool care of Jinglejam, Branch 10M and Jinglejam, Viva 5F. She receives Child Care Subsidy, so she is only responsible for her copay of \$25/each.

Jinglejam, Poppy 45F and Biggie each pay half of the total rent to the landlord (each responsible for \$300). They split the utilities, which includes electric for heating / cooling (\$150), and the water / trash bill (\$100). Poppy reports she pays her own cell phone bill of \$87.

Worker explained the utility standard, which Poppy chose as it is better for her case.



# Resources

Enter all resources reported by applicant/client.

- SNAP
  - All non-exempt resources (client statement is acceptable); document questionable resources and why further investigation is needed by the BPS

**\*Not Required for TANF**

**Case Narrative**

**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other

**Source:**  **Contact Date:**

**Program:** \*  SNAP  Medicaid  TANF  Child Care  
 EAP Fuel  EAP Cooling  EAP Crisis  VIEW  
 SNAPET  PEBT

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Household (0)

Non-Financial (0)

Income (0)

Expenses (0)

ESP (0)

Enrollment/Vendor (0)

Resources (0)

Other (2)

 Resources (1)

Program: SNAP | Source: Phone | Contact Date: 09-09-2025  
Created On: 09-09-2025 | Worker: BRUCE, CHRISTIE

Lottery inquiry completed and uploaded to DMIS, no matches.  
Jinglejam,Poppy 45F reports a Checking account, current balance \$30. No other resources reported.



# Other

- Anything that doesn't fit into other categories.
- List of Pending Verifications or checklist items (e.g. medical evaluation, disability referral)
- Outcome of application / renewal (approval / denial). If approved, include the benefit amount for each month during application period as well as ongoing benefit amount, new certification period.
- Any impacts to other Benefit Programs
- Method of payment (TANF – check, EPPIC Card, Direct Deposit, SNAP – EBT card mailed or Vault card issued).
- Tickets / Override actions / Workarounds / Benefit Adjustments

**Case Narrative**

**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other

**Source:**  **Contact Date:**

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 SNAPET  PEBT

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Household (0)

Non-Financial (0)

Income (0)

Expenses (0)

ESP (0)

Enrollment/Vendor (0)

Resources (0)

Other (2)

 Other (1)

Program: SNAP, TANF | Source: Phone | Contact Date: 09-09-2025

Created On: 09-09-2025 | Worker: BRUCE, CHRISTIE | Updated On: 09-10-2025 | Updated worker: BRUCE, CHRISTIE

After discussing income, resources, and expenses, SNAP is no longer expedite. Explained same to client who states she understands.

Pending verification of school enrollment, household composition, TANF form signatures (Disability, IPV, Personal Responsibility, Cooperation & Good Cause), and unearned income (child support).

School enrollment, household composition, and TANF forms needed for TANF only. Checklist explained to client and generated via locally to be mailed with TANF forms.

Explained VIEW program referral process, as client will be mandatory participant, and reminded client about the requirement to redirect any child support she receives from the absent parent after the TANF case is approved.

Discussed reporting requirements if approved, as well as Interim Report and Redetermination process. Advised client she will receive a Notice of Action for each program in the mail once the case is processed.

C/s she would like to get her SNAP card mailed if approved and would like to receive TANF via debit card if approved.



 Other (2)

Program: SNAP, TANF | Contact Date: 09-15-2025  
Created On: 09-15-2025 | Worker: BRUCE, CHRISTIE

Client provided all required verifications and signed TANF forms. Updated applicable screens in VACMS.

TANF approved, Sept. \$354, Oct. & ongoing \$394. Client will be mailed card. 12-month cert. period  
SNAP approved, Sept. \$626, Oct. & ongoing \$677. Client will be mailed card. 12-month cert. period.  
Notices will be sent via Central Print.  
Case to Supervisor for Authorization.



 Other (3)

Program: SNAP | Contact Date: 09-15-2025  
Created On: 09-15-2025 | Worker: AGGRAWAL, RUCHI

Case received from worker for supervisory authorization. Reviewed system, verifications, and eligibility. Case is correct. Supervisor authorized case. Notices to Central Print. Case back to worker.

# ESP (VIEW)






- Initial Assessments / Reassessments
- How the appointment was scheduled.
- Date of contact, information discussed, forms completed, barriers and goals discussed with client.
- Assigned Activity
- Specific details (employer name / hours / rate of pay, PSP/CWEP/FEP location, education program, duration, etc.)
- Follow up contact with client (how it was completed, outcomes, etc.
- Supportive Services offered / issued
- Sanction process, if applicable
- Communication with TANF worker
- 24 month clock updates, if applicable

**Case Narrative**


**Entity:** \*  Household  Non-Financial  Income  Expenses  
 Resources  ESP  Enrollment/Vendor  Other


**Source:**  **Contact Date:**


**Program:** \*  SNAP  Medicaid  TANF  Child Care  
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 [Household \(0\)](#)


 [Non-Financial \(0\)](#)


 [Income \(0\)](#)

 [Expenses \(0\)](#)

 [ESP \(0\)](#)

 [Enrollment/Vendor \(0\)](#)

 [Resources \(0\)](#)

 [Other \(2\)](#)

# Interview Closer

## Interview is complete

- If information is needed, advise client a checklist will be mailed requesting x,y,z
- If no information is needed, advise client a notice will be received in the mail.
- Discuss EBT card issuance, TANF method of issuance, and redirection of child support.
- Explain next steps, such as reporting requirements, interims, renewals, referral to VIEW, etc.
- Thank them for their time, ask client if they have any questions and if not now but later, they can contact you.

# Case Processing and Documenting

Processing cases and completing narratives go hand-in-hand.

As you update information in VaCMS, update the same information in your narrative.

This reduces time spent on a case and allows you to document while the information is fresh.

# Documentation Tells the Story



## Tell the Story Through Your Narrative

- Your case comments **represent your interactive interview** with the customer.
- Clearly explain **what happened, what you did, and what's still needed.**

## Avoid Incomplete or Disorganized Notes

- Hard-to-follow comments confuse reviewers.
- Missing or unclear info can lead to **mistakes or errors** being found in your case.

## Use the Documentation Guide

- Structure comments like a **narrative.**
- Help the next person **understand everything** you did.
- Include **all actions taken, decisions made, and pending items.**

# ONE AND DONE



“One and Done” is the philosophy of any interactive interview that strives to complete each application fully without the need for repetitiveness.



"One and Done" approach allows workers to complete most determinations with the first interaction with the client.



The goal is to provide same-day service. This can be inquiring the system, interactive interviewing, case documentation, processing and/or follow up.

# ONE AND DONE PRINCIPLES

1

Request only the minimum/mandatory verification required by policy.\*

2

Key as you go in VaCMS using interactive interview principles.

3

Complete the case and the narrative at the same time for better customer interaction.

4

Keep the customer on the phone through the duration of the interview.

5

Make collateral contacts to third parties to help verify needed income or expense information, using 3 way calling while client is on the line.

\*See Volume V, Part III for SNAP and 401.2 for TANF

# QUESTIONS???

For Additional Resources, please visit:

- Benefit Programs User Documentation Guide on Fusion
- VDSS-BPSE2210: The Art of Interviewing  
Module 1, 2, 3 on Virginia Learning Center