### Update 2016-22: Common Place

**Telephonic Signatures for Incomplete Periodic Reports**

#### Background

A telephonic signature (TS) is a type of electronic signature using an individual's recorded spoken signature or verbal assent in place of an actual written signature and is considered legally enforceable.

In 2015, Department of Employment and Benefits Services (DEBS) continuing offices began completing cash aid and CalFresh annual redeterminations with recorded TS.

#### Changes

When an incomplete Periodic Report (QR 7, SAR 7) is received, the client may be contacted by phone to provide any missing information and to sign and date the report by phone with a TS.

[Refer to “Processing Incomplete Periodic Reports,” page 45-6]

#### Implementation

Changes described in this Update are effective 8/29/16.

#### Documentation

Document why the report was incomplete and the actions taken in the **Maintain Case Comments** window of CalWIN.

#### Data Systems

The same system used to record cash aid and CalFresh annual RRR telephonic signatures (TS), Finesse, may now be used to record TS for incomplete periodic reports.
When using Finesse to call the client, select one of the following from the **Program** drop down menu:

- **CalWORKs** - for CalWORKs or CalWORKs/CalFresh combination cases,
- **Food Stamps** - for CalFresh Only cases,
- **General Assistance** - for General Assistance or General Assistance/CalFresh combination cases.

Select **SAR7/QR7** from the **Type** drop down menu. Enter the Case number in the **Case ID** box and the remaining information will auto-populate.
The Certification and Fraud Warning information contained on the back of the QR 7 and SAR 7 forms has been recorded and must be played to the client prior to recording their TS in Finesse.

To play the SAR7/QR7 Certification Recording for the client during the conference call, access the List of Contacts in the Finesse Phone Book and dial the “SAR7/QR7 Certification Recording” number.

The recordings are available in the following 10 languages:

- English
- Spanish
- Vietnamese
- Tagalog
- Mandarin
- Farsi
- Cantonese
- Cambodian
- Arabic
- Russian.

Other Programs

The Changes in this Update apply to CalWORKs, CalFresh and General Assistance.

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