**TELEPHONIC CLIENT REGISTRATION**

So, you are on the phone with someone that wants to apply for a program over the phone.

We need to do a Client Registration **(aka RFA)** over the phone and then take a telephonic signature. **(Remember, telephonic RFAs/Signature are VALID for Child Care)**

**Step by step**

1. In CWW, click on client registration….Basic Information
2. Enter applicant’s name, gender, SSN and DOB
3. On the Potential Individual Matches page….select the radial button…”Create a new RFA using entered Basic Information’….**(do not select either of the Mail-in application options)**
4. On the Additional Data page, you have a lot of information to enter.
5. RFA Type – ES Economic Support
6. Contact Date – the filing date
7. Contact Method – don’t choose a Katrina option – choose Phone
8. Language
9. County/Tribe – Choose the correct county
10. Office – this is a 4 digit number…the first two digits are either 50 or 55 (50 for non-W-2 cases, and 44 for W-2 cases) and the second two digits are the county number (for example, Dane is county 13, so for a Dane non –W-2 case, the office number would be 5013)
11. Assigned Worker ID – Enter your own X# if you will be doing an appointment with the client. If not, leave this blank. **(If you leave this field blank, the RFA will go to the county’s Inbox and will get scheduled/assigned with a worker. If you’ve already scheduled the appointment, but forgotten to enter the worker ID, the customer will be scheduled twice)**
12. Application Source – defaults to LA-Local Agency Office
13. Race
14. Ethnicity
15. County of Residence – again, choose the correct county
16. Address and phone
17. Contact information, if appropriate
18. Alternate Address, if applicable
19. Programs requested
20. Priority Service Determination Page – complete this page for all FS requests
21. Has the applicant received FS this month?
22. Enter the date you are determining PS eligibility
23. Household Monthly Gross Income, Assets and Rent/Mortgage Expense
24. Is the applicant a migrant or seasonal farm worker?
25. Does the applicant decline a PS appointment?
26. Print Application Registration – **(whoa, pause please)** – here is where you say yes to the Telephonic Signature question. That will bring up your script
27. In Genesys click Instant Conference and choose the ATS language
* Signing your application
* Once this is read, start the pre-recorded message by entering the appropriate program code on your phone keypad

**Program Codes (enter to begin playing pre-recorded message)**

* **01** HC only
* **02** FS only
* **03** CC only
* **04** HC+FS
* **05** HC+CC
* **06** FS+CC
* **07** HC+FS+CC
* **08** RFA
* **09** W2 (note that these codes will be displayed on the Generate Summary page during ATS)

