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| **SUBJECT:** PCOC Timeframes and Activities | **DATE:** 8/11/2021 |
| **TARGET AUDIENCE:** MyOptions Advisors | **REFERENCE NUMBER:** 03 |
| **TYPE:  NEW  REVISIONS:** | **REVISION DATE:** 10/26/21 |
| **PURPOSE:** Provides guidance to counselors participating as PCOC MyOptions Advisors regarding the number of PCOC sessions and timeframes for conducting PCOC. | |
| **CHANGES SINCE LAST REVISION:**   * 10/26/21: Defined the role of PCOC Counselors as counselors participating as PCOC MyOptions Advisors. All references to PCOC Counselors changed to MyOptions Advisors.   **DOCUMENTS/ASSOCIATED RESOURCES:**  **ATTACHMENTS:** N/A | |

Key timeframes and activities guiding the PCOC process:

1. The MyOptions Advisor will attempt first contact within 5 business days of the initial referral.
2. The MyOptions Advisor will conduct 1 PCOC follow-up call with the consumer within 15 business days of the initial PCOC session.
3. MyOptions Advisors may conduct a second follow-up call if it is determined necessary. The second follow-up call should be scheduled within 15 business days after the first follow-up session is completed. A second follow-up call is not a standard practice and should only be performed when the prospective consumer has not taken adequate steps to address his or her goals.
4. If unable to reach the consumer during the initial contact or as part of follow-up, the MyOptions Advisor will make 2 attempts on 2 different days before closing the case.

This process is illustrated below:

Diagram

Description automatically generated