Santa Barbara County

Benefit Service Center

Opened September 24, 2008
Service Center Staffing

- Management
  - 2 Managers

- Eligibility
  - 14 Eligibility Units
  - 7-8 Eligibility Workers
  - 1 Lead

- Analysis
  - Scheduling Analyst
  - Reporting Analyst

- Clerical
  - 2 Clerical Units
# Santa Barbara County Services

<table>
<thead>
<tr>
<th>Santa Maria Service Center</th>
<th>Santa Barbara District Office</th>
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<tbody>
<tr>
<td>• Medi-Cal Ongoing</td>
<td>• CalWORKs Intake/Ongoing</td>
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<tr>
<td>• CalFresh Ongoing</td>
<td>• Medi-Cal/CalFresh/GR Intake</td>
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<tr>
<td>• Medi-Cal Applications</td>
<td>• 2 Ongoing Caseloads of MC/CF</td>
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<td>• Task Based Environment</td>
<td>• Homeless population</td>
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<tr>
<th>Santa Maria District Office #1</th>
<th>Lompoc District Office</th>
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<tr>
<td>• Medi-Cal/CalFresh/GR Intake</td>
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<td>• Homeless population</td>
<td>• 1 Ongoing MC/CF Caseload</td>
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<tr>
<td>• ACA Call Center</td>
<td>• Homeless population</td>
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<tr>
<td>• Santa Maria District Office #2</td>
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<td>• CalWORKs Intake/Ongoing</td>
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Service Center Statistics

Ongoing CalFresh Cases
- Opening: 5,300
- Current: 13,907

Ongoing Medi-Cal Cases
- Opening: 20,000
- Current: 55,015

Calls abandoned and calls answered:

- 2016: Calls abandoned: 5,457, Calls answered: 7,563
- 2017: Calls abandoned: 3,219, Calls answered: 10,767

Average per month, Jan-September:
- Calls abandoned
- Calls answered

We average 14,000 calls and 11,000 case maintenance tasks per month.
Employee Morale & Retention

- 9-10% attrition rate
  - Most separate < 1 year of service
- Improved hiring practices
- Celebrate BIG
- Modeling the Way
- Exit interviews

Appreciation is about the whole person, not just their performance.

- 5 Languages of Appreciation
Recognition & Appreciation

Staff Appreciation
- Staff Appreciation Day (may be offsite)
- Staff Appreciation Week
- EW Appreciation
- Lead Appreciation
- AOP Appreciation

Theme Days
- Rodeo
- Lupus Awareness
- March Madness
- Holidays
- Spring Cleaning Days
- Summer Kickoff

Individual Recognition
- Department Newsletter Kudos (The Intercom)
- Appreciation Grams
- Affirmations/Bday

Guest Speakers
- Wellness
- Work/Life Balance
- Science of Customer Service
Employee Engagement

**Suggestion Box**
- Anonymous submissions
- Monthly Responses

**Leads United**
- Act as a liaison between staff and management
- Positively address policy and procedural changes emphasizing impacts to department, staff, and ultimately, our clients

**BPR Workgroup**
- Comprised of representatives at all levels in the service center to document business processes and hand offs through posted workflows

**Think Tank**
- Creative thinkers with front line experience to explore workload ideas to increase efficiency
Annual Staff Appreciation

Themes:
• We Survived
• Carnival
• Sailing to New Horizons
• Happy
• Super Hero

Activities:
• Speakers
• Teambuilding
• Food
• Certificates
Sprouting the Spirit

Presenters: Isabel Rodriguez and Alejandra Vargas
Service Center Model

**Case Maintenance**
- Time: 2+ days
- RRR Processing
- Periodic Reports
- CalFresh renewal phone interviews
- Craigs, ICTs, FH
- External Referrals

**Telephone Time:**
- Time: 2+ days
- Daily client contacts
- Wrap-Up/Case maintenance
- Task completion (1 & Done model)
- Outstation

**Lead Workers**
- Special tasks
- Agency queue

**Office Professional Units**
- Mail & scanning
- Task distribution
- EBT/BIC queue
- MEDS Input

**Phone Hours:** 8:00 a.m. – 4:00 p.m.
Service Center Technology

Call Management
- Fusion IVR (callback option)
- Call Center Worx (ACD)
- NEC VOIP Phones (800 series)
- NEC Global Navigator/Fusion (ACD reporting)

Workload Management
- DocStar (document imaging software)
- TMT (Task Management Tracking software)
- Verint Impact 360 (workforce scheduling & management)

Quality Assurance
- Call Recording/Screen Capture (RFP scheduled for FY 2017-18)
- Business process workflows (Intranet)

Ergonomics
- Dual Monitors
- Sit/Stand Desks
One and Done Model

Goals:
- Eliminate redundancy
- Increase quality of work
- Increase customer service
- Reduce calls

Expectations:
- Complete all open task work associated to a case whenever touched (phone call or case maintenance)
  - Includes processing alerts, IEVS, over/under issuances.
Eligibility Supervisor

A day in the life:

- Coach, mentor, and report/troubleshoot problem cases
- Compose and deliver staff evaluations
- Send/receive case returns (accountability)
- Conduct monthly One on One conferences
- Conduct monthly unit meetings
- Complete task/call reviews to ensure program and business process adherence
- Monitor GNAV/Contact Director to ensure unit member schedule adherence
  - Once a week supervisors rotate responsibility for monitoring call volume, sending SOS calls and ensuring queue is clear
# Service Center Resources

## Benefit Service Center

844-289-4682  
"Bringing Service Closer To You"

- **24 Hour Information**: (866) 404-4007  
- **FAX**: 287-3892  
- **Hearing Impaired Clients**: TTY/TDD (805) 614-1598

## BSC Resources

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<th>Workflows</th>
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<td>District Office Info</td>
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**Workload Management Tool**

## BSC Manuals

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<th>Technical</th>
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# Additional Resources - Workflows

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<td>Add MC App to an Active CF Case</td>
<td>Documents Scanned in District Offices</td>
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<td>Adding a Newborn</td>
<td>Documents to be Scanned by Worker Request</td>
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<td>Adding a Person</td>
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<tr>
<td>Address Changes; Returned Mail; Homeless Mail</td>
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<tr>
<td>BIC/EBT Re-Issuance</td>
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<td>CalFresh Restoration Processing</td>
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<td>CF Fraud Requests</td>
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<td>CF Probation/Parole Violator</td>
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<td>Case Returns</td>
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<td>Cases Needing Recurrent MC/FS Overrides or CF NSDl’s</td>
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<td>Confidential Case Assignment</td>
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<td>DED Process</td>
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Ongoing Challenges

- Balancing phone and task work
- Prioritizing work – everything is important
- Increasing percentage of MAGI RD Extended cases
- Balance focus for staff on what they get done, versus what needs to be done.
What is Next?

- Telephonic Signature
- Call Recording/Screen Capture for Quality Assurance
- Post Call Customer Survey
- Outbound calls reminders
- Octopus – Email portal
Questions

1. Metrics for Staff and Supervisors
2. How is schedule adherence monitored?
3. How are staffing levels determined?
4. Task Tracking Tool – TMT
5. Tools/Handouts/Cheat Sheets available
6. Ideas to help staff adjust to changes in call center

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