

Contra Costa County's MediCal and CalFresh Service Center: An Innovative Way to Help Clients

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EXECUTIVE SUMMARY

In 2005, Contra Costa County implemented their MediCal and CalFresh Service Center (MCSC), with the intent of expanding program access to ongoing active MediCal and CalFresh recipients. Over the years, the call center evolved leveraging various types of technological enhancements as well as implementing innovative staffing models in an effort to efficiently serve their client base. Contra Costa created a Tier One worker position through the formation of the Work Experience Program.

This program allows the county to hire Welfare to Work (WTW) recipients to assist with the incoming calls to their service center. The implementation of this program has reduced the overall call volume by 10%, allowing more clients to be served quickly and efficiently. The program benefits the WFW recipients as well by allowing them to meet program requirements while building marketable job skills which can later be transferred to obtaining long-term employment.

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Introduction

With the implementation of the Affordable Care Act (ACA) in January of 2014, caseload sizes increased considerably across counties in California. Along with increased caseload size, regulations associated with the ACA required that counties assist clients via the phone with insurance plan selection through the California marketplace known as Covered California. As such, counties with existing call centers made an effort to increase call center technology and structure. Additionally, new call centers opened across the state in an effort to meet the regulatory mandate. In Sonoma County, the combined caseload size increased by 60% as a result of ACA implementation.¹ Post ACA implementation, caseload size in Sonoma County has continued to remain substantial, which has significantly increased overall call volume into the previously established Economic Assistance Service Center (EASC). Contra Costa County's innovative call center model offers both structural and technological solutions that can assist in easing call volume and providing timesaving measures for continuing case processing, while also providing cost savings measures regarding staffing.

Background

On a monthly basis, the EASC receives an average of 8,900 calls.² Currently, the EASC employs 45 non-probationary Eligibility Specialists (ES) who

dedicate half of each workday to answering incoming calls. The remaining half of the workday is dedicated to processing continuation-based tasks for the 73,740 CalFresh and MediCal cases.³ On average, each staff member receives 100 continuing tasks per month to process between the two programs. Call wait times on average are 46 minutes and average call handle time is 29 minutes as of March 2019.⁴ Furthermore, the EASC has a backlog of continuing casework that is challenging to reduce based on call volume and low staffing levels.

In 2005 Contra Costa County launched the MediCal CalFresh Service Center (MCSC) which is part of Contra Costa County's Employment and Human Services Department (EHSD). At the MCSC, staff members provide call center service to roughly 145,000 active MediCal and/or CalFresh cases.⁵ The MCSC is currently staffed with 105 Eligibility Workers who dedicate 40% of their work week to answering calls and 60% of their work week to processing continuing casework. Units are comprised of roughly eight to nine members with one supervisor per unit. Units are comprised of program-specific Eligibility Workers. The unit also includes a Social Services Program Assistant (SSPA) that process both Medi-Cal and CalFresh cases. Each unit is paired up with a second unit creating a team concept. As a result, when changes are reported

1. Sonoma County Trendex Report: EA Edition, February 26, 2019 (internal document)

2. Sonoma County Trendex Report: EA Edition, February 26, 2019 (internal document)

3. Sonoma County Trendex Report, EA Edition, February 26, 2019 (internal document)

4. Point in time data can be accessed via eareporting@schsd.org

5. MCSC Monthly Report March 2019 can be accessed via email at: abarrett@ehsd.cccounty.us

at the case level, eligibility subject matter experts seamlessly update the case and work with their program counterpart to ensure that eligibility integrity is met for both programs. Workers specific to the MediCal program are assigned a target of 70 annual renewals each month for processing. Workers specific to the CalFresh program are assigned all Semi-Annual Reports, which averages about 45 per worker. CalFresh workers are also assigned out all recertifications to process, which averages 35–40 per month. In addition to the assigned work, staff process program-specific tasks while on phone duties. Staff are expected to attempt to resolve the caller's reason for calling into the MCSC. If the task cannot be completed via the phone call, staff can self-assign the task for follow up work. All work is distributed through a task-based program that evenly distributes tasks amongst the staff members based on program expertise. The MCSC handles 22,000 monthly calls (6,000 per week).⁶ On any given day there are roughly 40 Eligibility Workers covering phone duties.

Tier One Workers: A Win-Win for Human Services and CalWORKs Recipients

In addition to the units listed above the MCSC has previously implemented a “Tier One” worker concept, which they are in the process of reinstituting in the very near future. This Tier One concept is a unit staffed with up to eight temporary Eligibility Worker I staff who assist in call handling. This unit is responsible for simple phone tasks such as ordering MediCal and CalFresh cards, confirming receipt of documents, case status updates, renewal dates, and rescheduling recertification appointments for CalFresh recipients. Most of the calls are resolved within five minutes. The impact of this unit has been substantial in the past, fielding up to 2,000 calls per month, which is nearly 10% of the overall monthly call volume. Of the calls fielded by the Tier One workers, roughly 50% of all CalFresh inquiries

and 30% of all MediCal inquiries are resolved by the single exchange with the Tier One worker. Tier One workers are provided with in-house training covering topics such as: confidentiality rules, various systems training, overview of expectations, and customer service delivery. Tier One workers spend four days of the work week answering calls and the other additional day of the week is dedicated to clerical-based tasks such as imaging documents and assisting with Inter County Transfers. Another benefit of this unit is that some of the temporary positions are hired from Contra Costa County's CalWORKs recipients who are participating in the CalWORKs Work Experience Program.⁷ This program provides CalWORKs recipients an opportunity to build marketable skills within a call center environment that can assist in securing long term employment. Typically, the CalWORKs recipient can hold this position for six months, with the potential of extending the duration to nine months. Conversely, the Tier One concept assists the MCSC in moving 10% of the calls from the eligibility staff, allowing them to focus on more complex client inquiries and needs. The MCSC clerical team's work volume is also reduced by the Tier One staff. The Tier One staff assist with scanning documents, process returned mail, and order internal eligibility reports for upcoming MediCal annual renewals, allowing clerical to focus on other priorities. Additionally, hiring this population as temporary employees is beneficial to the department as it offers a substantial cost savings as wages paid to the employee are budgeted into the annual CalWORKs allocation.

Sonoma County Human Services Department Employment and Training Division offers work experience programs as well to CalWORKs recipients. These programs, the Enhanced Subsidized Employment (ESE)⁸ and the Transitional Work

6. MCSC Monthly Report, March 2019 can be accessed via email at: abarratt@ehsd.ccounty.us

7. Contra Costa County Employment and Human Services Department Manual, May 20, 2008

8. Sonoma County Human Services Department SonomaWORKS Training & Work Handbook – Enhanced Subsidized Employment, October 2, 2018 (internal document)

Program (TWP),⁹ also offer opportunities to clients who are eligible for Welfare to Work (WTW). Through the two programs, clients are able to gain job experience and build skills that will eventually lead to permanent employment prospects. While the recipient is participating in one of the programs listed above they are able to retain an active CalWORKs case. The recipients participating in the ESE and TWP programs are offered employment opportunities via a current contract between Sonoma County and Goodwill Industries.

MCSC and Information Technology Collaborative

The MCSC relies heavily on internal Information Technology (IT) staff to assist with the technological aspects of the call center. This team aptly named the Voice team is responsible for providing assistance for five total call centers within the EHSD, the MCSC being the largest. The MCSC utilizes NICE inContact cloud-based call center software that assists in the following key features in running a call center:

- **Call recording capability:** records all calls for quality review and offers the ability to do telephonic signature by snipping key parts of the conversation capturing the client's verbal signature and storing it for audit purposes.
- **Call throttling:** sets a predetermined maximum number of calls the call center can field in a given day. Once the calls hit the maximum threshold, callers are asked to call back at a later time.
- **Call back functionality:** allows the caller the option of requesting a call back rather than waiting on hold.
- **Establishment of phone queues:** directs calls to specific functionality, for example all incoming MediCal calls are placed in a MediCal-specific phone queue.
- **Caller satisfaction survey:** offers the caller the option to participate in a call center survey. The

system contacts the caller based on the telephone number they used to call into the MCSC, allowing the caller to select an option if they had a positive or negative call experience as well as offering the ability to leave comments specific their call.

The software detailed above is supported and enhanced by the Voice team. In addition to providing technical support the Voice team assists with monthly phone coverage scheduling, training, creation of job aids, and continuous service enhancements for both the MCSC and callers. The Voice team is comprised of an administrator and two Automated Call Distributors (ACD I/ACD II); the team is overseen by an IT administrator. The ACD I role is embedded onsite at the MCSC to assist with training, day-to-day troubleshooting of phone issues, and providing support to a designated supervisor of the day who continuously reviews the phone queues, looking for call volume and wait times. The ACD II role is responsible for system deployment and enhancements.

One important factor that the EHSD considered when creating the Voice team is they staffed the ACD position with an employee who had previously held a position as an Eligibility Worker. This has been instrumental, as this position has been able to offer insight and foreshadow potential issues that could arise when deploying new software or processes as it relates to program regulations and procedures. Having an in-depth understanding of the Eligibility Worker role has served to enhance the relationship and communication between the MCSC and the Voice team. The MCSC leadership and the Voice team meet weekly to discuss ways to continuously improve the business model of the MCSC.

In Sonoma County the EASC management team has a strong collaborative relationship with their departmental IT team. Meetings are held monthly to review ways IT can support the EASC and the division as a whole. Departmental IT also assists the entire Sonoma County Human Services Department in troubleshooting phone and computer

⁹ Sonoma County Human Services Department SonomaWORKS Training & Work Handbook – Transitional Work Program, December 5, 2018 (internal document)

issues, procuring software, system maintenance, and serving as a liaison to the greater Sonoma County IT team. One key difference is the embedded support staff at the EASC is not comprised of departmental IT team members. This team is called the Economic Assistance Reporting unit and consists of a Program Development Manager and two Administrative Aides. The team is responsible for the following tasks: creation of reports as they pertain to the Economic Assistance Division, scheduling of phone coverage, management of task distribution tool, and collaboration with supervisors and management regarding enhancement of quality review tools, processes and procedures.

Recommendations

With the identified successes Contra Costa EHSD has experienced surrounding the MCSC staffing structure and IT collaboration, the following are recommendations for consideration for Sonoma County to further enhance and assist in providing quality customer service to MediCal and CalFresh clients:

- Institute a Tier One worker concept leveraging CalWORKs WTW recipients to provide front-line phone screening for the EASC. This unit can provide much needed phone assistance by fielding calls that require no eligibility determination or knowledge. It can be anticipated that this unit will reduce overall calls handled by Eligibility Specialists by roughly 10%, or nearly 1,000 calls per month. This concept provides cost savings in hiring staff and assists WTW clients with the chance to build desirable skills and offers further work experience in an effort to obtain long term employment. Additional cost savings could be derived from reducing the scope and volume of the existing contract between the Employment and Training division and Goodwill Industries.
- When hiring or restructuring the departmental IT team, consider hiring or repurposing staff members who possess specific program knowledge. This assists in being able to seamlessly

implement new processes or technology, enhance existing supportive software, and development of job aids. This could be beneficial to more than just the Economic Assistance Division as other divisions within the department could gain from having a program filter applied to an IT position. IT staff members could be embedded at divisional worksites which would further build collaboration between the sections and improve communication within the department as a whole. Lastly, the structure of the existing Economic Assistance Reporting Unit could benefit from overseeing the embedded IT staff member listed above.

Considerations for Recommendations

When reviewing the recommendations listed above, Sonoma County should consider the following:

- Should the county's existing contracts be expanded to utilize additional companies?
- What are the potential impacts to the department if the volume of client referrals to contracted partners decreases by offering clients the option of fulfilling their WTW requirement via employment in the EASC?
- How would hiring WTW recipients work given current hiring practices, such as, completion of background checks, testing, and ranking of positions?
- Are there any labor/union issues that could arise?
- Would it be more beneficial to hire permanent clerical positions rather than the CalWORKs recipients to staff the Tier One unit? This would eliminate the six month time constraint.

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