

Improving Customer Service: Eligibility Specialists in the Call Center

SARA DOOLEY

EXECUTIVE SUMMARY

Napa County's current process has Eligibility Specialists returning client phone calls within two business days. Clients who call in to the Call Center are greeted by an Office Assistant who takes a message and forwards it to the assigned Eligibility Specialist. By doing so, clients have to wait to have their needs met. In following the One and Done model of

service, both Monterey County and Solano County have expedited the processing of clients' benefits, leading to better customer service. By having Eligibility Specialists in the call center, most clients' needs are met with one telephone call. In following this model, Napa County can learn from and build on the success of the other counties.

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Introduction

There are many situations, both common and unique, that lead clients through the door of their local social services office. Regardless of which program or programs they apply for, the common denominator they all share is that they are in need of services. Napa County has an estimated population of 140,973.¹ Of these households, there are 17,211² active cases on CalFresh and/or Medi-Cal. In keeping with the mission statement, Napa County is “on a mission to serve the community and support its health and well-being.”³ In doing so, it is important to review how benefits are issued and see if there is a more efficient process.

The Napa County Self Sufficiency Services Division (SSSD) has multiple locations within the county. There are satellite offices located in American Canyon, Calistoga, and within the Comprehensive Services for Older Adults office. There is one Call Center that is centrally located within the primary Eligibility office known as South Campus. The Call Center is staffed by three Office Assistants and one Senior Office Assistant.

The current process has clients speaking with a live person when they call in. The Clerical staff are able to answer basic questions, only referring clients to their assigned Eligibility Specialist for more complex needs. When a client requires a return call from their Eligibility Specialist, a Contact Client task is set in the C-IV system. The Eligibility Specialist has up to two business days to return the call. This can lead to clients having to wait up to two calendar days, possibly four if they call on a Friday, for help. This can create a delay in getting a client’s needs met.

In order to streamline the One and Done model of processing, as well as keeping within the timeframes set by both the state and federal governments, Napa County is currently exploring having Eligibility Specialists in the Call Center. This process will potentially get clients their benefits sooner.

Interactive Voice Response

The purpose of an Interactive Voice Response (IVR) system is to route callers to the most appropriate outcome based on the prompts selected. Several menu options allow clients to narrow down their needs, which can be met by the IVR automated system, or by being routed to a General Queue, where they can speak with a live person.

Monterey County

In 2013, Monterey County adopted the Call Center One and Done process. In 2018, they progressed to the Customer Service Center model. Through this, clients can have their ongoing CalFresh and Medi-Cal needs met in an efficient and streamlined manner via their IVR system. This ensures “that any (client) calling the Customer Service Center... is assisted the first time they call, thereby eliminating the need for the (client) to call more than once for the same purpose.”⁴

The Customer Service Center houses ten units of seven to eight staff members each. The units stagger their shifts, starting at 7:45 a.m., to ensure the Customer Service Center is consistently staffed. Eligibility Specialists spend three to five days per week on telephones with their remaining time spent on

processing. They work in banked caseloads, through a task-based system in C-IV.

It is the expectation Eligibility staff will average 30 minutes per telephone call when in the Call Center. This timeframe includes processing the whole case, as well as talk and hold time with the client. When assigned to processing, it is the expectation they will average six cases per day. If there is a high volume of calls in the Customer Service Center, Eligibility staff will be pulled off processing in order to keep call times down.

Solano County

In 2016, Solano County started their “One and Done” pilot project in their Benefits Actions Center, with the current model being fully implemented in December 2017. The purpose of this project is to “handle all of the caller’s needs within one phone call,”⁵ with case resolution happening the same day. Eligibility Workers are expected to take the case as far as they are able at the moment and, if needed, finish at a later time.

The Benefits Actions Center houses six units of nine staff members each. There are four telephone shifts per day and shifts are four hours long. The two units that are assigned telephone shifts back each other up. Each Eligibility Worker has no more than one telephone shift per day, with three to four shifts per week. On the days Eligibility staff are assigned to telephones, they are also assigned Semi-Annual Reports (SAR⁷) and return mail to process. This allows them to focus on their follow-up work. On processing days, they are assigned CalFresh Re-certifications, at 10 per day. Staff work in banked caseloads through a task-based system in CalWIN. The expectation is that cases are processed to complete and/or reviewed the same day.

Success

In combining their Call Center and case processing, Monterey County was able to create the Customer Service Center. Within the first month of starting their program, they saw the overall service level

increase from 5.41 percent to 25.01 percent. It has been climbing ever since. Triageing callers also reduced the average handle time and speed of answering calls.⁶ When call volume is low, both Clerical and Eligibility staff work on different projects.

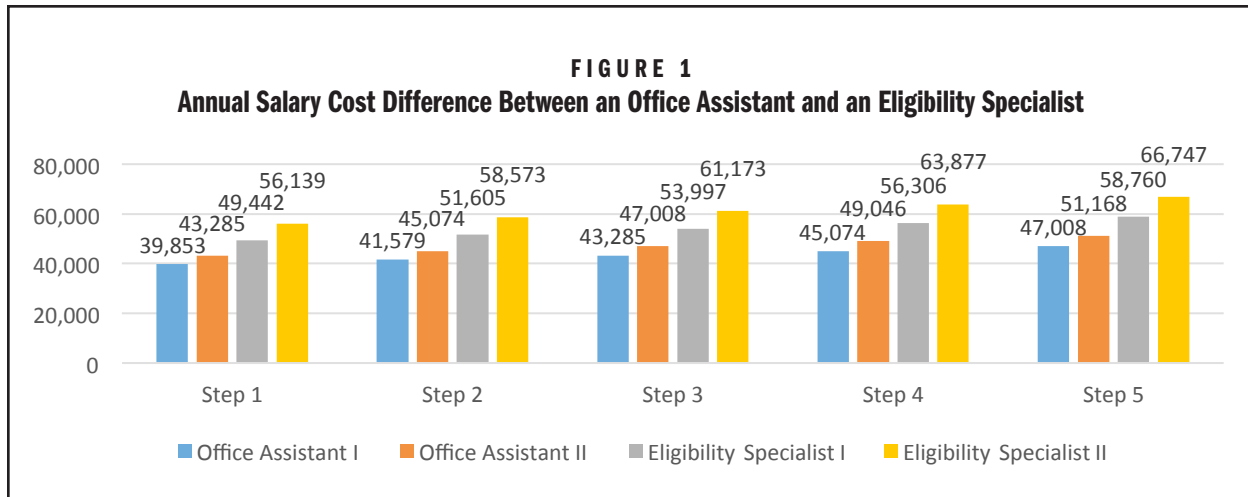
For Solano County, in starting their Benefits Actions Center they used a swat team of “Ninjas,” also known as super processors, to bring their numbers down. In doing so, they were able to implement this process with a second unit. By following the One and Done model, Eligibility Workers felt empowered and accomplished.

Concerns

For Monterey County, it took about eight months to get the ball rolling with this process. Many practices were learned through trial and error, which evolved the program. When the first phase of the project was completed, there were areas identified that required additional training and resources. One area was the Triage Unit and the implementation of a half page “cheat sheet” that gives steps on what to do in different situations. The sheet was created as a training tool for the Triage Clerical staff to have when answering general calls. This was in relation to re-certifications, income, address changes, program discontinuance due to over income or failure to provide, household composition changes, 1095 reprints, and appointment rescheduling.⁷

Another concern was with having clerical staff answering the phones. While this is efficient for handling calls that do not require Eligibility staff, in doing so, if a client needs to speak with an Eligibility Specialist, they are routed back to the CalFresh or Medi-Cal queues in order to speak with said worker. This extends the length of time the client has to wait to be served. It has since been determined that these calls jump to the front of the line, giving clients less wait time.

For Solano County, it was determined that staff were negatively impacted with trainings, meetings, and absences. Follow-up time became an issue as phone shifts did not allow enough time to complete



the daily follow-up. This has become a struggle for staff.⁸ Also, there continues to be a backlog due to Re-certifications taking two weeks to complete.

Data

In Napa County, when a client calls in to the Call Center and requests to speak to an Eligibility Specialist, a Contact Client task is set. In an emergency, the task is given with a call back time for the same day. Otherwise, Eligibility Specialists have two business days to return the call. A six-month timeframe was reviewed to determine how many Contact Client tasks are assigned per month to the Eligibility Specialists. From November 2018 through April 2019 there were an average of 935 Contact Client tasks set per month,⁹ which encompasses all units. While unable to determine how many calls are from the same client, for the same application, re-certification, etc., this is a concern. Also, this data does not capture the clients who come into the office to be seen as well if their need was not met through a telephone call.

Cost

It is important to have an adequate number of Eligibility Specialists to properly implement the Call Center process in Napa County. In converting three vacant Office Assistant positions into Eligibility Specialists, there will be no change to the actual number of staff for SSSD, but there will be an increase

in cost. Without an increase in staff, there will be no increase to the benefits package. The increase in cost will occur with salary. Currently, at Step 5, an Office Assistant II makes \$51,168 annually, where an Eligibility Specialist II makes \$66,747. This is a difference of \$15,579 annually. Multiplying this by three positions, this is an increase to the budget of \$46,737 annually. This is only \$4,431 less than an Office Assistant II position.

The annual salary cost difference between an Office Assistant and an Eligibility Specialist will rise with experience and Step increases as in *Figure 1*.¹⁰

There are several options available in order to mitigate the expense of converting the three Office Assistant positions to three Eligibility Specialists positions. If the county is committed to converting the positions across the board, two of the Eligibility Specialist positions can be filled at this time, with the third being filled when the budget is healthier. This would give Napa County a savings of \$20,010 annually until the third position is filled.

If the straight conversion does not work within the budget, there is an option to convert the three vacant positions into two Eligibility Specialist positions. This would also give Napa County a savings of \$20,010 but would eliminate one position, which may cause extra work in the future to re-instate this position.

Another option is to convert and fill the three vacant positions to Eligibility Specialist. Then, the

next time an Office Assistant position becomes vacant, it would not be filled. While this would cost more in the short term, in the long-term it will save the County money.

Napa County recently purchased the Cisco Finesse IVR telephone system. Since this has already been purchased, it would not be an added expense for this project. With Finesse, each participating Eligibility Specialist would be assigned as an agent. In doing this, staff can be tracked to see who is available, who is processing, and who is on a call.

Within Finesse there is a drop-down menu where an Eligibility Specialist can manually set their status as follows:

- **Ready:** This status is used when first logging into the system, or when complete with processing and ready for the next call.
- **Reserved:** Once an Eligibility Specialist sets their status to Ready, Finesse will update their status to Reserved and will give them the next call on hold.
- **Talking:** Once the call is answered, Finesse will set the Eligibility Specialist's status to Talking.
- **Not Ready-Finishing Previous:** Once the call has ended, Finesse will update to this status. The Eligibility Specialist can leave this as their status until they are done processing and ready for the next call. Finesse will not automatically revert back to Ready, the Eligibility Specialist will have to manually set themselves back to Ready.
- **Not Ready-Break:** The Eligibility Specialist will manually update to this status when they take their break.
- **Not Ready-Lunch:** The Eligibility Specialist will manually update to this status when they take their lunch.
- **Sign Out-End of Shift:** The Eligibility Specialist will set this status when they are no longer assigned to the Call Center.

In Finesse, supervisors can run reports on individual staff call length, including the longest queue time. They are also able to configure queue details, send a

broadcast message to their team, or silently monitor an agent while the agent makes a manual outbound call. The Desktop Chat function of Finesse allows agents to chat with other agents and supervisors, as well as experts outside of the Call Center.¹¹

Conclusion

Napa County is moving forward with having Eligibility Specialists in the Call Center. Currently the conversion of vacant Office Assistant positions to Eligibility Specialists is in process. This means having the Deputy Director take this to the Board of Supervisors for approval. If successful, the new Call Center pilot can be started.

In following Solano County's process, it is recommended that "Ninjas," or super-processors, be used to work on the backlog to bring it current prior to the start of the pilot program. In following Monterey County's process, it is recommended that Office Assistants answer the initial call. By doing so, it can be determined if the client belongs with intake or ongoing, assigning the call to the appropriate unit. While cross training staff in all programs is recommended, in order to keep with the One and Done model, it is important to separate the intake and ongoing functions when assigning calls and/or processing.

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