

Increasing Client Access Through Technology

Jeimil Belamide

EXECUTIVE SUMMARY

This case study highlights the use of the internet, smartphones, digital (telephonic) signature and social media by the Santa Clara County Social Services Agency in administering CalFresh, Medi-Cal and CalWORKs. The use of these specific technologies works to create greater program access for clients. Electronic signature technology allows clients to sign documents over the telephone, reducing the dependence upon paper documents. The My Benefits CalWin (MyBCW) mobile app allows clients to submit documents 24/7. Text messages can be sent to clients informing them that their case may be discontinued even when mailed correspondence does not reach them. Social media can be used to distribute instructions on how to complete confusing program documents. All of this access is available, quite literally, with a push of a button.

Program Management worked closely with Eligibility Workers to develop business practices that utilize these technologies to ease the workload for both clients and staff. Other agencies should attempt to do the same. Through the use of these technologies, not only can agencies increase client access to services, but agencies can also maintain a helpful, consistent presence in a client's life while he or she participates in the program. These technologies directly have an impact on increasing case retention rates, lowering lobby traffic and saving time for clients and staff. Indirectly, these technologies can help an agency increase its visibility to the community and make it easier for eligible individuals/families, who may be less inclined, to apply for social service programs.

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Introduction

County social service agencies should seek to increase the general public's access to their services. Diversifying how social service agencies communicate and transact with the general public is a logical and necessary step that agencies are taking to increase that access.

Interactions with social service agencies are sometimes perceived as tedious and time-consuming, deterring participants from taking the appropriate actions to receive helpful benefits. Travelling long distances, using public transportation to drop off documents, or waiting over long periods of time on the telephone to speak with an Eligibility Worker (EW) can act as barriers that prevent people from seeking the benefits of a social service agency. Part of a social service agency's responsibility is to help eliminate those barriers and streamline business processes to the extent that eligible individuals and families can reach the agency in a manner that is convenient. One way to eliminate those barriers is by properly utilizing existing technologies and operating in widely used modern channels of communication.

With 84% of American adults using the internet¹ and 77% of American adults owning a smartphone,² county social service agencies across California, including San Francisco County, are increasing their presence in the digital landscape through the development of agency websites, text messaging initiatives and electronic methods of document and signature gathering. Moreover, as the number of American adults using social networking sites continues to

¹ [Americans' Internet Access:2000-2015](http://www.pewinternet.org/2015/06/26/americans-internet-access-2000-2015/) www.pewinternet.org/2015/06/26/americans-internet-access-2000-2015/

² [Device Ownership](http://www.pewresearch.org/data-trend/media-and-technology/device-ownership/) www.pewresearch.org/data-trend/media-and-technology/device-ownership/

increase,³ some agencies are developing a presence in social media. The usefulness for agencies to create identities and opportunities for client interactions through digital communication is witnessed in our very own lives. Think of how you bank and how you communicate with your doctor—banks and doctors allow you to sign up for online accounts so that you can have your interactions with them at your convenience.

With this in mind, and with ongoing initiatives in San Francisco County aimed at modernizing and streamlining client access to the agency, it was extremely helpful and interesting to visit the Santa Clara County Social Services Agency and learn about how its use of technology helps families and individuals indeed increase their access to services.

The Department of Employment and Benefits Services (DEBS), which administers the CalFresh (CF), Medi-Cal (MC), General Assistance (GA) and CalWORKs (CW) programs as part of the Santa Clara County Social Services Agency, use multiple digital/web-based methods to assist program participants in their interactions with the county. Beginning in 2013, the agency has rolled out multiple business process and practices.

- The My Benefits CalWin (MyBCW) mobile application has been integrated into DEBS business processes to allow clients to submit documents related to their participation in the CF, MC, GA and CW programs through the use of smartphones.
- Telephonic Signature technology has been fully incorporated into the recertification business process, allowing clients to legally sign documents over the telephone.

³ Social Media Usage:2005-2015 www.pewinternet.org/2015/10/08/social-networking-usage-2005-2015/

- Text Messaging technology is utilized so that the county can quickly send direct, short and real-time messages to clients.
- Social Media is used by DEBS to communicate with clients and the general public outside of normal agency interactions and business hours.

Mobile App BCW

California's county social service agencies are individually responsible for administering eligibility and issuance of benefits for the CF (SNAP/Food Stamps), MC (Medicaid), GA (cash assistance) and CW (TANF – Temporary Assistance for Needy Families) programs. Of the 58 counties in California, 18 county social service agencies utilize CalWin, a web-based computer program used to enter client data, determine client eligibility and issue program benefits.

The MyBCW Online Portal is a website that allows the general public to apply for programs, upload/submit related documents and check on the status of their participation using any personal computer connected to the internet at their convenience—24 hours a day, 7 days a week. The MyBCW Mobile App allows participants to access the portal and many of its functions on their smartphones.

The ability for participants to self-serve at their convenience helps to reduce time spent travelling to county offices and waiting in line to see a worker and/or drop off documents. This decrease in the amount of time spent “idling” in office lobbies—waiting for required transactions with the county—allows participants to have more time to participate in activities that can possibly lead to self-sufficiency such as: seeking employment, exploring educational opportunities and

receiving rehabilitative/medical services.⁴ The opportunities for handling required transactions via the self-service platform offered by the MyBCW mobile app allow an individual to meet program requirements and retain needed benefits while simultaneously continuing on a path of self-sufficiency.

DEBS has developed a business process that assists clients in navigating the MyBCW mobile app. Upon visiting one of the four DEBS offices throughout Santa Clara County, applicants are handed informational flyers on how to setup an account through the MyBCW portal and how to access the mobile app on their smartphones. Lobby Greeters are available to assist clients in creating their personal accounts.⁵ In addition, posters and flyers are posted and visible in client waiting areas and interview booths.

As the use of the MyBCW mobile app helped to increase client access to DEBS, it also helped to lower the number of individuals visiting agency offices. Upon rollout in September 2015, DEBS offices had a weekly average of 1,500-2,000 clients visiting its office. Currently, the number of clients visiting the office has dropped to a weekly average of 1,000-1,600 per week. The decrease in foot traffic allowed DEBS to repurpose the office space formerly used as a client overflow area into a conference room for staff.⁶ The relaxed and calmer atmosphere of a less crowded lobby area has also helped to improve the overall customer service experience.

⁴ Anonymous CalFresh participant interview (2017) SF County.

⁵ Rivera, Garcia, E. (2017) Email Interview Santa Clara County Social Services Agency

⁶ Leininger, P. (2017) Data Pull 2017 Santa Clara County Social Services Agency

Telephonic Signature

DEBS currently uses technologies that allow clients to legally sign program documents over the telephone. Incorporating these technologies into the process of completing CF Recertification applications has added great efficiency and eases the process for both customers and staff.

Prior to the release of ACIN I-60-13 by The California Department of Social Services (CDSS) in 2013, counties required clients to physically sign all documents related to program eligibility.

The ACIN recommend that counties develop business processes that allowed clients to electronically sign documents in place of an actual written signature. In Santa Clara County, the electronic signature meant using a digitally recorded and stored verbal attestation of statements taken over the telephone – a telephonic signature.

DEBS began planning and testing the use of telephonic signature in 2014 with a small group of eligibility staff. Heavily dependent upon EWs' input, a process that incorporated the use of telephonic signatures to complete recertification applications for CF and CW was developed and implemented.

An EW begins each telephone interview by reading a brief but detailed script to clients, informing them that interview is being recorded to take a telephonic signature. Once the interview is complete the client is asked to listen to an automated message of a program participant's "Rights & Responsibilities" as required by program regulations. The client is transferred back to the Eligibility Worker to finalize the telephonic signature. The client is asked to state the date and his/her full name after which the application is considered legally signed.

All recordings of telephonic signatures are captured and stored electronically through Calabrio software and can be accessed by DEBS staff whenever necessary for case review and auditing purposes.

The introduction of the telephonic signature process demonstrated varying positive effects on workload, customer service and client retention. The need to spend time and resources (e.g., personnel, postage, materials and supplies) on stuffing envelopes with recertification packets and mailing them to participants was virtually eliminated. The requirement to print and send each client a “Statement of Facts” upon the completion of an interview, an action that itself can take 5-8 minutes to complete, is no longer needed to be done individually by EWs. Instead, a list of telephonic signatures is compiled and sent to the Central Services for mass printing and mailing to clients.

Customer service improved as clients no longer had to dedicate time to complete the form and physically mail it back to the county. Also, within the first three months of telephonic signature implementation, Santa Clara’s discontinuance rate due to incomplete recertifications decreased from 30% to 10%. The county continues to maintain a recertification churn rate well below the state average.⁷

Clients and DEBS staff expressed satisfaction with the telephonic signature process as voiced in the following testimonials:⁷

- “[Telephonic signature made us] able to conduct impromptu interviews outside of scheduled appointments.” – DEBS EW

⁷ Mazon, S. (2017) *Santa Clara County Social Services Agency– Telephonic Signature Recordings PowerPoint*

- “Not having to get daycare [for the interview] and I was able to schedule [it] during my child’s nap time.” – Client
- “Wish this was implemented years ago [because it] really helps with homeless clients or client[s] that moved and did not report address [changes].” – DEBS EW
- My mother is disabled and my husband works, so being able to stay home for the interview and not having to complete that thick [recertification] packet was really nice.” – Client

Texting

DEBS uses text-messaging technology to reach its clients. Initiated and piloted in 2012 by the CalWORKs Employment Services section, it is now used by all sections within DEBS. The text-messaging feature already included in the Microsoft Outlook product package is used to send text-messaging to clients. Clients are currently limited to replying to the county’s text messages and are unable to initiate a text message of their own to the county.

Upon application, clients are asked for their mobile phone numbers and their consent to receive text messages. Mobile phone numbers are entered in CalWin and uploaded to the Microsoft Outlook interface, enabling EWs to send text messages to clients in a manner similar to sending an email.

Text messages are for informational purposes only and do not eliminate the need for EWs to send hard copies of official correspondence and notices of action. EWs are instructed to keep text messages under 160 characters and are given templates to follow. Text messages are sent to

client's to inform them of the following:⁸

- Appointment reminders and requests for missing verifications
- Notifications of incomplete/missing periodic reporting documents
- Notices of expiring exemptions
- Reminders to report possible case updates (newborns, address changes)

Text messaging technology has allowed for real-time communication between EWs and clients. Clients can be made more aware of necessary case actions which can lead to greater chances for positive eligibility determinations. Text-messaging reminders can also act as a failsafe for instances when paper correspondence is lost in the mail or goes uncollected. Further, texting can help to ensure that eligibility is determined timely and based on current life circumstances. Increasing client opportunities for accurate and timely reporting can help mitigate potentially incorrect determinations of eligibility and lead to higher case accuracy rates, leaving the county less vulnerable to state quality control citations.

Social Media

The use of social media by DEBS started in February 2017 and has helped establish a social media voice in the community. The agency has a YouTube channel and can be found @scssadebs on FaceBook, Twitter and Instagram.

DEBS posts and tweets on a variety of topics with varying intentions. Some tweets/posts are informational like “Dental benefits are included in Medi-Cal benefits!” or “Periodic reports are

⁸ Boland, D. (2016) Santa Clara County Social Services Agency Memorandum #16-09

due now,” while other tweets/posts simply pass along food recipes that use inexpensive ingredients or wish its followers a good weekend. The YouTube channel provides How-To videos for viewers on how to complete periodic reports. Due to the infancy of the social media presence DEBS is not yet able to measure the impact it has had on customer service.

Conclusion

Santa Clara County’s utilization of current technology simplifies business processes for both clients and staff. Along with increasing client access to the program, it has also worked to improve the quality of all interactions by allowing for more case actions to take place at each client touch point. With greater opportunities for self-service and a decrease in dependence upon EW availability leading to higher retention rates and shorter processing times, the time and resources poured into implementation of the various technology-based business processes have proven to be worthwhile. As the Human Services Agency (HSA) of The City and County of San Francisco is already on the way to implementing new business processes that include similar technologies, the county should seek to mirror some of the same implementation strategies used by Santa Clara DEBS – where EWs are involved from the beginning stages of planning. Additionally, San Francisco should attempt to measure the success of implementation through the collection of appropriate “before and after” data. If the success of similar technology in Santa Clara is an indicator, clients of San Francisco’s HSA will be given greater control of their participation in the program.

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