

Integrated Call Center

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EXECUTIVE SUMMARY

In 2018, Contra Costa County implemented the Integrated Call Center in their Department of Aging and Adult Services, specifically for the Adult Protective Services (APS) and In-Home Supportive Services (IHSS) programs. The programs had experienced difficulty keeping up with calls during the intake process, which prompted concerns that vulnerable populations were not accessing as many services. They needed a solution and decided to develop a

system that streamlined calls and workflow to improve service delivery. The Contra Costa County's Integrated Call Center "one-stop-shop" approach was developed and is an innovative call system for APS and IHSS which allows for immediate access across multiple programs and addresses these concerns. The Call Center receives calls for IHSS, APS, and Senior Information.

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Background

Contra Costa County is located on the eastern side of the San Francisco Bay. As of the 2020 United States Census, the population of Contra Costa County was 1,165,927. The Department of Aging and Adult Services (DAAS) currently has 161 employees. The Information & Assistance (I&A) Integrated Call Center is staffed with six full-time and four part-time Social Worker I's. Their role is dedicated to the call center; therefore, these workers do not carry cases or manage a caseload.

Although there are many differences between Contra Costa County and Santa Clara County, they share a common goal to serve vulnerable populations through the provision of efficient and effective services. Santa Clara County is California's sixth most populous county, with a population of 1,936,259 as of the 2020 census. Housed within the Department of Adult and Aging Services, IHSS is the largest of five programs, along with Adult Protective Services, Senior Nutrition, Office of the Public Administrator/Guardian/Conservator, and Seniors' Agenda, that together comprise the Department of Aging and Adult Services (DAAS). In 2021, IHSS and APS had a combined total of 241 employees.

This report will evaluate the Integrated Call Center to examine how it could potentially be applied in Santa Clara County.

Integrated Call System

There are multiple portals of entry to receive services from Aging and Adult Services in Contra Costa County. They include the Senior Information & Assistance Line (I&A), IHSS, and APS. Since a caller may

need the support of more than one of these services, Contra Costa County has expanded the Senior Information and Assistance line to become an Integrated Call Center so that a caller has immediate access to all three programs. The integrated call center streamlines the intake processes of IHSS and APS while improving access to services since many callers may have overlapping needs of multiple programs. Those callers who need IHSS may get referrals to caregiving resources while their application is processed, or an APS report may be necessary when a caller has needs such as housing or nutritional resources because they have been a victim of abuse/neglect or financial abuse. In addition, the I&A helpline serves as the entry point to the local aging services network, providing information and referrals to community programs to help callers address their needs.

The I&A staff are cross-trained and able to access multiple databases (e.g., the state-mandated CMIPS for IHSS, county-selected LEAPS for APS, and MEDS to check Medi-Cal) to complete the processing of the call. Staff have immediate access to multiple programs, which creates a "one-stop-shop" approach to accessing aging and adult services. Staff assist callers at the point of contact, whether it is for an intake with APS or IHSS or to provide information and referral. Staff also make follow-up calls and/or make warm hand-off referrals to other agencies for callers who might need extra help due to isolation, vulnerability, or other factors. The follow-up calls from the I&A staff are timely, however, the staff are not case-carrying workers who would normally conduct follow-up calls. The I&A staff classification is that of a Social Worker 1 who answers the helpline and assists callers with services; their general approach is to assess callers for

needs and refer them to services they are eligible for. I&A staff have a flow chart they utilize for guidance. The I&A social workers are currently on a hybrid schedule, working three days in the office and two from home. A challenge for Contra Costa County in developing the Call Center, which continues to be true to date, is the difficulty of providing training for all three programs on an ongoing basis. However, being efficient and comprehensive in the services provided is what Contra Costa County strives for.

In the fiscal year 2021-2022, between the months of July '21 and April '22, the Call Center received an average of 1,823 calls. The I&A staff who accept calls are highly trained and able to navigate the database to identify appropriate programs for the callers. For example, if a caller expresses that he/she recently became homeless and needs housing, the social worker will explore the reason for the recent housing concern. In doing so, the social worker might find out that the caller was living in an abusive living environment and the caller wants to move out. The social worker will then submit an abuse report based on the information and provide safe shelter information. Because the social worker has access to multiple databases, callers' histories are easily accessible to better understand the caller's circumstances. Services are also expedited between APS and IHSS based on urgency regarding the caller's needs. If a caller has a need for a caregiver and they are not connected with IHSS, the social worker can begin processing the IHSS application. If the abuse/neglect is occurring because the caller needs a caregiver, the social worker can submit an APS abuse report.

Database

Contra Costa County has demonstrated that having software that is comprehensive will ease the functionality of those utilizing it to better serve the public. Contra Costa County has cross-trained its staff in the use of multiple databases so that they are able to easily navigate between them in order to gather pertinent information to best assist the caller. Contra Costa County 211 is part of the integrated call system, which makes for a "one-stop-shop" for callers.

In 2003, the Santa Clara County Social Services Agency Information Systems (SSA-IS) created an in-house APS database system to manage case information and statistics for the APS program. However, there was limited capability to update the system, track statistics, generate reports, and measure outcomes. Since there is no statewide data system established for APS, Santa Clara County APS established an RFP process for a new database system. The result was off-the-shelf systems that were either too limited in their capability or were not cost-effective. The SSA-IS and APS developed an in-house case management system, which was implemented in 2018, that features updated technology, data reporting, and streamlined documentation. The APS case management system also includes four structured decision-making tools that are embedded in the associated modules (e.g., intake, assessment, service plan, and closure) of APS reports and cases. The system is also compliant with changes the State made to monthly statistical data reporting starting in 2019.

In 2017, APS implemented call center technology with improved reporting capability. The automated call distribution system ensures customer service and response to callers and mandated reporters. It also includes a system that tracks the

volume, type, frequency, and duration of calls to improve accountability to the public, consider business process redesign, and allow management to plan for staffing at peak call times. The Structured Decision-Making Tools (SDM) use structured assessments to increase consistency and accuracy in case management, increase efficiency in the use of available resources, and provide data for program administration, evaluation, and budgeting. The intake assessment helps assess whether the referral should be investigated, and if so, how quick the response time should be. This is completed during the first phone call received that reports abuse or neglect of an individual. This is the only tool that is completed during the intake process. IHSS uses CMIPS, the state-mandated database system. In Santa Clara County IHSS has partnered with Technology Services and Solutions (TSS) on the Automated Intake Distribution Project. This tool automatically assigns intake cases to be distributed to social workers, eliminating the reliance on a supervisor to manually assign intake cases. This has been a highly anticipated project as the manual assignment of 300-400 cases takes several days with many opportunities for human error. The automated intake tool was first tested in October 2021, assigning the intake cases automatically. Sourcewise, the local Area Agency on Aging, notified IHSS that they had funding for a limited number of iPads for qualifying participants. IHSS staff can refer qualifying recipients to address the digital divide. The IHSS Quality Assurance manager created the referral form, which is sent to Sourcewise, along with a consent form to start the process. These forms are now accessible online for an easy referral process to Sourcewise.

General Application in Santa Clara County

In Santa Clara County, the ACE database is used by APS, which poses a challenge in trying to integrate it into a call center since it is managed solely by SCC APS. ACE has been personalized for APS, however, having said that, changes to ACE can be made to reflect new practices. APS and IHSS do not currently share databases, nor do they have access to each other's databases. They are working in intradepartmental silos that can produce quality work.

There is the thought that programs are duplicating services by having their own call center instead of combining the call centers. APS hotline/call center data shows that in fiscal year 2021, 18,400 calls were received during business hours. In fiscal year 2021, IHSS received 154,445 calls, of which 4,461 were intake calls. Intake staff in APS are classified as Social Worker II/III, intake is the first point of contact for Santa Clara County. IHSS intake staff is classified as Clerical Support. While Contra Costa County designated the Social Worker I classification as the first point of contact, it would be a challenge to combine positions due to different classifications for individual programs. While an Integrated Call Center is a complex endeavor with organizational and structural challenges, the benefits are tangible, whether realized now or in the future.

Benefits for APS and IHSS include:

- High collaboration and effective communication to increase employee productivity in the silo, which enables staff to perform better at their jobs.
- Streamlining intake processes to create a no-wrong-door approach for

aging services is an ideal approach for rendering services.

- Blending funding to create integrated service teams, utilizing what is already in place, and expanding what is needed.
- Combined efforts in IHSS and APS to collaborate and use resources already available.
- Collaborating across divisions to ensure a coordinated response to consumer needs and inquiries should be a shared vision.
- Engaging with the community to develop comprehensive referral resources, this would include the local Area Agency on Aging, Sourcewise.

Conclusion

Contra Costa County Integrated Call Center has been in operation for four years. Four years of implementation with ongoing cross-training and evaluation of new tools (SDMs) to better serve callers is what makes the call center work. The integrated call center streamlines the intake processes of IHSS and APS while improving access to services since many callers may have overlapping needs of multiple programs. Having a “one-stop-shop” approach in accessing aging and adult services is what Contra Costa County developed. It took Contra Costa about eight months to get the call center running, and while it appears somewhat complex and difficult to achieve, the benefits have been worthwhile.

In Santa Clara, existing DAAS services are limited and underfunded, resulting in inadequate resources and frustration from

the public and community partners. It is worth exploring to see if it makes sense to adopt a call center that is integrated in nature. Technology improvements, including an online mandated reporting portal, will help streamline and improve current business processes.

Acknowledgments

I want to thank Nhang Luong, Project Coordinator, Information & Assistance (I&A) Program, Aging & Adult Services. I am very grateful for the wealth of knowledge that Nhang shared with me. I also want to thank the instructors and staff at UC Berkeley Extension for hosting this BASSC program.

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