

# Contra Costa County's Enhancement of Customer Experience in Its District Office Reception Lobbies

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## EXECUTIVE SUMMARY

The enactment of the Affordable Care Act (ACA) brought a challenge to counties all over California to provide the highest level of service to its customers that will be applying and receiving benefits through its human services agencies. With the increased enrollment in Medi-Cal adding significantly to the workloads, counties must find a way to redesign their eligibility system and business processes to enhance the customer experience.

The Contra Costa Employment and Human Services Department (EHSD) developed the "Office of the Future" concept as a response to this challenge. Contra Costa County looked at and developed a plan to resolve key service delivery issues that

were facing EHSD. A key component of enhancing the customer experience at EHSD is the modernization of its five district office reception lobbies.

To increase efficiencies to its service delivery, Contra Costa undertook a holistic review of its offices and completed several initiatives to address issues affecting client services:

- Modernization of its lobbies
- Technology enhancement
- Changes in its business processes

This case study looks at Contra Costa County's planning strategy and best practices as compared to San Francisco's experience.

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## Introduction

On March 23, 2010, President Barack Obama signed into law the Patient Protection and Affordable Care Act (ACA), or health care reform, that brings health care access to millions of Americans. The implementation of health care reform also brings a mandate for states and counties to provide a first class customer service to citizens who are applying or receiving health care benefits through ACA.

As a response to this federal mandate, the California Welfare Directors Association (CWDA) developed four goals for ACA implementation:

- **Enrollment in all available coverage** - To provide customers all coverage options they are eligible to receive.
- **No Wrong Door** - Applicants and recipients will receive services, regardless of where they seek assistance.
- **High Quality Customer Service** - Customers shall receive consistent, high-quality, customer-friendly, and responsive service.
- **Coordinated Services, or Horizontal Integration of Services** - Services are effectively coordinated so that customers do not need to repeat their information or provide the same information to multiple entities, and are offered the opportunity to apply for other services they appear potentially eligible to receive.

These goals have significant implications for the manner in which county Human Services Agencies are administering their programs and the way they are delivering services to their customers. The expansion of Medicaid eligibility to include low-income, non-disabled, non-elderly, and childless adult population alone will make more than

a million Californians eligible for health care. In addition, counties are expected to help consumers enroll in Medi-Cal or Covered California through the state's customer service center. Therefore, the above stated goals force counties to evaluate existing resources that include staffing, office buildings, and systems as part of the ACA implementation. Training staff to a different way of delivering services, lobby improvements or renovations to accommodate service delivery demand and changes, and training and acquisition of new technology to accommodate these changes are examples of efforts that need to take place in order to meet ACA goals.

This paper evaluates Contra Costa County's strategies and efforts related to the ACA implementation, and captures best practices by way of results, benefits, and outcomes.

## Background

The Employment and Human Services Department (EHSD) is the second largest department in Contra Costa County, and provides more than 60 programs serving over 100,000 citizens in need of basic protection and support services each year.

Even prior to ACA, it was already an enormous task for EHSD to improve customer service given high demand for benefits, limited resources, and strict compliance standards set by federal, state, and local government. Its geographical size, distance between the district offices, and changing demographics are adding to the county's challenges.

As required by CWDA, Contra Costa EHSD had to develop a plan to comply with the goals for the implementation of ACA.

To accomplish these goals, EHSD completed the following steps:

1. Identified the key service issues
2. Developed a strategy and plan to address these service issues
3. Created a vision for the Office of the Future
4. Designed and built the vision

### Contra Costa County's Key Service Issues

Many key service delivery issues faced the Contra Costa EHSD. The central and most critical issue was being able to provide immediate service at its district offices and reducing the wait times connected with these visits.

Other key service delivery issues included:

- Client phone calls coming through multiple phone numbers, providing for an inconsistent client experience.
- Calls forwarded to worker voicemail, which were not readily returned due to workload and resulted in escalation of issues to supervisor.
- Several visits were necessary for clients to complete the application process.
- Manual appointment scheduling and rescheduling was done by individual workers and reception staff.
- Document-imaging processes were not standardized and did not fully meet business process need to ensure timely service to applicants. All new applications were completed using paper documents and sent off to the document-imaging vendor, IKON. Immediate access to client applications/documents were not possible.
- Access/CalWIN Integrated Voice Response (IVR), which allowed clients to automatically access case information 24 hours a day, was underutilized.
- BenefitsCalWIN.org is the web portal through which we receive on-line applications. This portal has broader capacity for utilization and is another means by which the public may apply for public benefits.
- Appointment scheduling is isolated to only individual district offices and is not set up for countywide appointment scheduling.

### Project Overview

In order to best serve the growing number of its customers, EHSD contracted with InTelegy to receive guidance on addressing these key delivery issues and enhancing its service delivery model. InTelegy Corporation has worked with several counties throughout the state in developing and implementing needs-based solutions to these problems.

EHSD and InTelegy worked on a plan to redesign the client application process and business processes in the district offices for major benefit programs.

The objectives outlined in the strategy included:

1. Modernize and standardize on best practices across the 5 district offices.
2. Improve the client experience by providing multiple access channels to obtain benefits.
3. Improve the working environment for EHSD staff by better managing their workload, providing new technologies, and creating streamlined processes.
4. Provide flexibility in ongoing operations so staff can be utilized where they are needed the most.
5. Leverage the time and resources expended on other major department initiatives through the inclusion and coordination with the Office of the Future for maximum benefit to clients.
6. Foster and maintain a private sector business model where EHSD is literally competing for client business.

### Vision for the Office of the Future

The objectives outlined above created a vision of what the Office of the Future would be. To carry out this vision, EHSD planned to implement streamlined processes and enhanced technologies. The plan included obtaining a lobby management system, automated call distribution system, point of entry scanning, task management tool, and a new appointment scheduling system. The plan also included renovations of the district office lobbies to accommodate planned changes. These changes were aimed

toward changing Contra Costa County's business process from an application or case-based process to a client based process.

## Design and Build

After identifying the key service issues, devising a strategy and plan to resolve these problem areas, and creating a vision for an ideal office, the next step for Contra Costa was to design and build the Office of the Future.

To accomplish this enormous task of building an Office of the Future, 7 committees were created:

- **Steering Committee** - Comprised of committee leads and other key stakeholders to ensure that committees are focused, and to formulate the final business process
- **Operations** - To define structure and processes
- **Workflow-Process Redesign** - To develop procedures and supporting documentation
- **Communications** - To plan for the Office of the Future communications
- **Training** - To pre-launch training requirements for cross-training
- **Technology and Document Imaging** - To plan and implement all technology tools in support of the Office of the Future, and to develop plan for implementing document imaging at the point of entry
- **Facilities** - To plan for improvement of the lobby (e.g. furniture, flooring, technology)

The above committees were led by managers, supervisors, workers, clerks, and specifically appointed union representatives across all five districts offices with the support from InTelegy. Staff were directly involved in business and service delivery process development and decision-making, technology planning, and determining future staff roles and responsibilities. In addition to the 7 committees, an Executive Oversight Committee was also created to provide overview and direction to the design and build effort.

EHSD chose the Hercules District Office as the Office of the Future pilot.

## Staff Involvement and Interface with Unions

As mentioned above, specifically appointed union representatives across the districts were part of the design and build committees to ensure that information regarding the plans for changes were communicated to the union leaders. Union briefings, updates and meet and confer meetings with the union partners were held to address questions and concerns, solicit input, and share decisions. The bureau director also had monthly meetings with Local 1021.

In addition, significant effort was put into communicating planned changes to staff through newsletters and regularly held presentations. EHSD also worked closely with the county Human Resources Department and its Personnel Division to address any workload and union issues.

## Results and Outcomes

After months of designing and planning, the Hercules District Office opened as a pilot for the "Office of the Future" a year ago. With new business processes and physical improvements in place, clients came in to a more efficient and client-friendly office with the redesigned look, additional services, and new technologies.

The improvements include the following:

- **Check-In Kiosk** - EHSD acquired a customer flow management system, NEMO-Q. Its kiosk checks in customers when they arrive and permits them to sit down instead of waiting in line. With this system in place, customers are able to do other activities such read books or magazines, or access the internet using the free Wi-Fi provided by the office, while waiting in virtual queue and knowing that their place in line is secure.
- **Lobby Greeter** - EHSD stationed a greeter to assist customers in using the kiosk, direct them to the correct area of service, provide information, refer customers in need of services that are not provided by the office, work closely with the employees at the front desk to facilitate immediate service to customers, and keep the lobby organized.

- **Automated Call Distribution (ACD)** – In order to handle large volumes of phone calls from customers, ACD is implemented to automatically and systematically route calls directly to an available agent based on the customer need, type, and agent skill set. ACD allows EHSD to handle phone calls in an orderly manner and to make sure the client’s call is answered by a live person that can help them. The system also has an Auto-Dialer feature that automatically sends out appointment message reminders to clients.
- **Point of Entry Imaging** – EHSD moved from a paper-oriented environment to one where incoming customers correspondence is scanned at point of entry. This new system increases efficiencies by allowing critical information to be forwarded to workers who need it in processing a customer’s application or report. It decreases processing time for information that needs to be reviewed and processed.
- **Lobby Self-Help Stations** – EHSD created a self-serve station that includes a copier and computer access for customers to apply online using the MyBenefitsCalWIN website. A self-scanning kiosk was also installed to permit clients to scan paperwork and receive a receipt without waiting in line. Courtesy phones are easily accessible, and provide clients with a more private interaction with staff.
- **On-line Rights and Responsibilities** – Contra Costa County’s Rights and Responsibilities online video page was created so clients can access the video through the Internet anywhere. It saves applicants time at the county office by allowing them to watch the 35 minute video at their own time and convenience. Once the client had completed watching a video, a certification is automatically sent to EHSD that is valid for 45 days.

## Conclusion

Contra Costa County’s strategic planning and implementation of the “Office of the Future” in its Hercules district office significantly enhanced its

customers experience by improving client satisfaction and access to benefits. This is evidenced by the timely processing of client applications, reduction of the wait time for benefits, and prompt answering of phone calls. Although comparison data for before and after the implementation is not available, client surveys conducted by Contra Costa EHSD indicated positive feedback from the customers. Clients commented that the lobby is more organized and easier to navigate. Overall, clients feel they are getting more professional and quicker services from the EHSD.

The benefits of these changes are not limited to clients only, but also extend to employees and management. With efficiencies created by the lobby redesign, workers are able to focus more on completing tasks and processing of applications through improved lobby operations. The new technologies provide management with a better view into the day-to-day activities of staff, which allows them to quickly address issues as they occur. Management is now able to manage work processes through a single reporting structure (see attached spreadsheet).

## Recommendations for San Francisco Human Services Agency (SFHSA)

This case study examined Contra Costa County’s planning strategy that led to improvement of its service delivery and their great efforts in moving towards the model of the “Office of the Future.” Although service delivery data before the implementation was not available for outcome comparisons, anecdotal references indicate improvement of services.

The physical improvement to the EHSD reception lobbies has significantly contributed to the overall efficiency and better customer experience. In fact, there are three initiatives that are recommended for San Francisco to consider:

- The use of iPad for Lobby Navigators to provide mobile and online access to the Lobby Management system.
- The installation of self-serve scanning kiosks or stations that will allow self-scanning of documents by customers to eliminate face-to-face

contact with county staff when submitting documents.

- Post an online video of the Rights and Responsibilities for customer to view at their convenience on the department's website.

Overall, in comparing Contra Costa County's planning strategy to the efforts of SFHSA, it is evident that San Francisco is on a parallel track. In addition to the comprehensive Service Integration plan, SFHSA has already undertaken a "No Wrong Door" policy supported by sophisticated technology where performance by matrix can be defined—the "Office of the Future" will be here soon.

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