

# **SANTA CLARA COUNTY: EMPOWER AND ENGAGE CLIENTS THROUGH EXISTING TECHNOLOGY**

**Blanca Hanley**

## **EXECUTIVE SUMMARY**

This report outlines Santa Clara County Social Services Agency's (SCSSA) approach to empowering customers by helping them stay connected to the MyBenefits CalWIN website and the MyBenefits CalWIN mobile application. Customers can avoid waiting in long lines for simple self-service requests. These can include requesting a replacement Medi-Cal card, submitting documents and requesting detailed Electronic Benefits Transfer (EBT) transactions, all accessible in the palm of a hand, tablet or laptop.

### **Project Description**

The vision of CalWIN has evolved into MyBenefits CalWIN and MyBenefits CalWIN the mobile application allowing customers online access to screen for eligibility, apply for benefits, submit reports and upload documents. With CalWIN's online access, the customer is empowered to manage his or her case and in the process reducing lobby crowding. SCSSA has been proactive in its approach to showing customers how to navigate MyBenefits CalWIN and MyBenefits CalWIN the mobile application by providing a lobby greeter who can provide one-on-one tutorial with the customer on how to create his or her MyBenefits CalWIN account. Once the account has been activated applicants can screen for eligible programs, apply for CalWORKs, CalFresh, and Medi-Cal benefits and recipients can submit documents, view notices, check Electronic Benefits transfer balances, and submit reports. SCSSA has installed

Wi-Fi access in its lobbies and has provided tablets for the greeters to demonstrate the online tools available through MyBenefits CalWIN and MyBenefits CalWIN the mobile application. The greeters are Work Experience (WEX) employees who have first-hand experience navigating through their own MyBenefits CalWIN and MyBenefits CalWIN the mobile application. MyBenefits CalWIN and MyBenefits CalWIN the mobile application are advertised throughout the lobby via posters, flyers, handouts and PowerPoint presentations.

### **Recommendations**

Contra Costa County Employment and Human Services (EHSD) should continue to promote technology in order to empower its customers, improve customer experience, alleviate lobby traffic and reduce the barriers for customers in need to access our programs.

# **SANTA CLARA COUNTY: EMPOWER AND ENGAGE CLIENTS THROUGH EXISTING TECHNOLOGY**

**Blanca Hanley**

The Santa Clara County Social Services Agency prides itself in its mission statement: “To provide resources and opportunities in a culturally responsive manner to enhance the quality of life in our community by protecting, educating and empowering individuals and families.” This project is based on how the Department of Employment and Benefit Services (DEBS) empowered its customers by utilizing existing technology while reducing office lobby traffic and decreasing wait times.

Santa Clara County Social Services Agency is comprised of four departments: Department of Aging and Adult Services (DAAS), DEBS, Department of Family and Children Services (DFCS) and Agency Office (AO). Santa Clara County has a diverse population of approximately 1.84 million and is one of the largest public agencies in county government. Its budget represents 12.6 % of the total county budget or a \$622.3 million dollar budget. Within that budget, \$5.9 million dollars is allocated to fund 46 community organizations. These community agencies provide essential services to the poor, minority, disabled, homeless and at-risk populations. Services include food, counseling, domestic violence intervention, child abuse prevention, day care, senior and legal services, emergency shelter, health care, immigration counseling, job training, education and social adjustments programs.

DEBS serves an average of 11,000 needy families per month through the CalWORKs program, over 55,000 households in CalFresh program, and over 360,000 low to moderate-income

individuals per month in the Medi-Cal program. Additionally, 332 General Assistance recipients and 87 refugees are served monthly.

In 2015, one of DEBS's strategic goals was to reduce lobby traffic and to enhance the customer experience. An initiative was developed to promote the MyBenefits CalWIN web portal as well as the CalWIN Mobile Application as a method for customers to communicate with DEBS without having to physically enter the crowded lobbies. The goal is to empower customers as the MyBenefits CalWIN allows customers to access their benefit information, submit applications, report relevant information, and attach documentation.

Additionally, the CalWIN mobile application provides an overview of the programs and services offered, such as Medi-Cal, CalFresh and CalWORKS as well as providing the CalWIN office locations, disaster assistance, and access to My Benefits. The MyBenefits CalWIN mobile application is available to customers in the Apple App Store (for iPhone and iPad users) and the Google Play Store (for Android phone and tablet users). The DEBS plan was designed to target continuing customers to sign up for MyBenefits CalWIN and the CalWIN Mobile Application. A plan was implemented in which Welfare to Work participants were selected to manage the lobby as the dedicated lobby greeter. The benefits of utilizing Welfare to Work participants are two-fold: as the participants earn valuable work experience, credit for mandatory Welfare to Work hours, the customers also have the opportunity to learn from the experts who themselves utilize the promoted MyBenefits CalWIN/Mobile Applications.

DEBS also promoted MyBenefits CalWIN by using lobby signage in hopes to capture the customer while in the lobby. Enlisting the services of a lobby greeter is the best opportunity for customers to familiarize themselves with the MyBenefits CalWIN Application, CalWIN Mobile Application, and the array of services available on these mediums. A Benefits Specialist also

takes the time to inform the customer of the valuable benefits of having a MyBenefits CalWIN/Mobile Application account.

The lobby is equipped with free Wi-Fi and in real-time the greeter instructs the customer on how to log in to MyBenefits CalWIN/Mobile Application. The lobby greeter, with tablet in hand, promptly approaches the customer walking into the lobby to determine what relevant services would be of interest and how he or she can assist. The lobby greeter informs the customer how to log in to MyBenefits CalWIN/Mobile Application and the benefits of doing so. For example, through the application, customers are able to snap a picture of requested documents with their phones, download the document, and send it to DEBS. Uploading the verifications is primarily the duty of a clerical unit, but DEBS has given Benefit Specialists the CalWIN permission to upload and print.

One particular Benefits Specialist states that she finds that having permission to upload documents is critical. Customers often call her to report that they downloaded the necessary verifications to complete the RRR or completed the required SAR and it simplifies her work flow.

Another benefit of having a MyBenefits CalWIN/Mobile Application account is that customers can request to view notices via their portal. The ability to view notices of action cuts out any wait time for the notice, proving to be an invaluable trait. Customers are informed via email address that a notice of action can be viewed in their portal.

MyBenefits CalWIN website is an easy and efficient way for California residents to learn about and apply for health care, CalFresh and cash assistance programs. The website is continuously monitored to ensure secure and private benefit information is transmitted to the county of record.

Unfortunately, DEBS does not have statistical data that supports how lobby traffic has been reduced or how wait time has decreased. One distinct outcome is that reception no longer has to move customers into the overflow lobby.

The social services industry is following the private industry's lead in promoting links and mobile applications in order to provide the best customer service possible without having to enter the brick and mortar buildings of yesteryear. Customers enjoy the ease of on-hand information with such features as having the ability to view benefits, check Electronic Balance Transfer (EBT) balances, learn if potentially eligible for benefits and subsequently apply for them, report changes, complete reports, upload documents, request a replacement Medi-Cal card, sign up for Electronic Notices and sign up for Alerts and text messages.

Additionally, community based organizations are also utilizing MyBenefits CalWIN by submitting applications. They are also assisting in advertising the CalWIN Mobile Applications. The increase of customers using MyBenefits CalWIN/Mobile application has allowed staff more time to work on complex situations instead of being interrupted for minor actions such as a replacement Medi-Cal card.

As with any new project, planning is key. DEBS developed a work process and started by allowing supervisor's access to upload documents. Once they became familiar, DEBS allowed Benefit Specialists the ability to download CalWIN documents. The buy-in must begin with the staff, as they learn the benefits of accessing MyBenefits CalWIN, they will share and encourage their customers to utilize it.

Customers continue to have 24 hour access to their EBT accounts via telephone but the utilization of the MyBenefits CalWIN/Mobile Application has given customers increased access to their cases and alleviated wait times when contacting the county by phone or in person. One of

the tools of the Mobile Application is that it can provide you with the nearest office utilizing your smart phone's GPS.

In addition to promoting the MyBenefits CalWIN/ Mobile Application, DEBS has also implemented telephonic signatures for CalWORKs and CalFresh renewals. The telephonic signature process allows workers the ability to obtain a client's telephonic signature and eliminates the need to gather a client's written/ink signature during an annual CalWORKs/CalFresh renewal. The telephonic signature process also eliminates the need to mail out the renewal packets prior to the telephone interview. Workers will now review the documents during the telephone renewal interview and obtain the customer's verbal agreement by phone. After the interview, the worker mails it to the customer along with the information renewal packet. None of the forms need to be returned, but if there is a discrepancy in the Statement of Facts, customers are instructed to contact their worker to report the discrepancy. This practice has successfully removed multiple forms for customers to complete and return and the need for scheduling mandatory face-to-face interviews. MyBenefits CalWIN/Mobile Application and telephonic signatures have alleviated lobby traffic and are expected to reduce the "churn rate" and improve customer experience. The "churn" is when customers do not complete the renewal process or other requirement for various reasons, but then quickly re-enroll, typically within 90 days.

### **Contra Costa County**

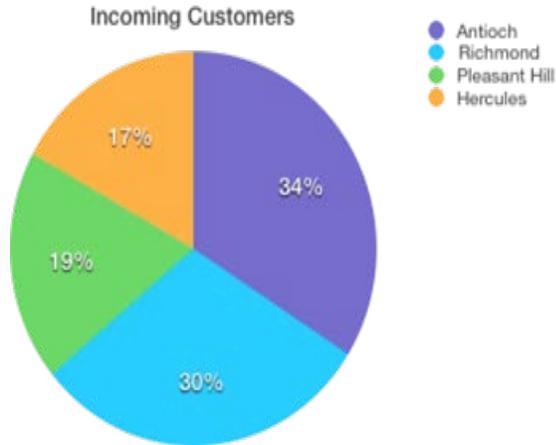
Contra Costa County's mission declares its dedication "to providing public services which improve the quality of life of our residents and the economic viability of our businesses." In an effort to improve residents' quality of life, Contra Costa County relies heavily on the Employment and Human Services Department to provide fundamental services.

In 2015, workers managed a CalWORKS caseload of 9,492 cases and processed a total of 10,956 CalWORKS applications. Comparatively, CalFresh caseloads consisted of 35,850 cases and 38,643 applications were processed that year. The implementation of Health Care Reform has created an unprecedented demand for services with a record number of county residents seeking health care benefits. In 2015, the Medi-Cal Service Center serviced 138,665 active Medi-Cal cases. The county allocated \$434,627,907 to fund these aid programs.

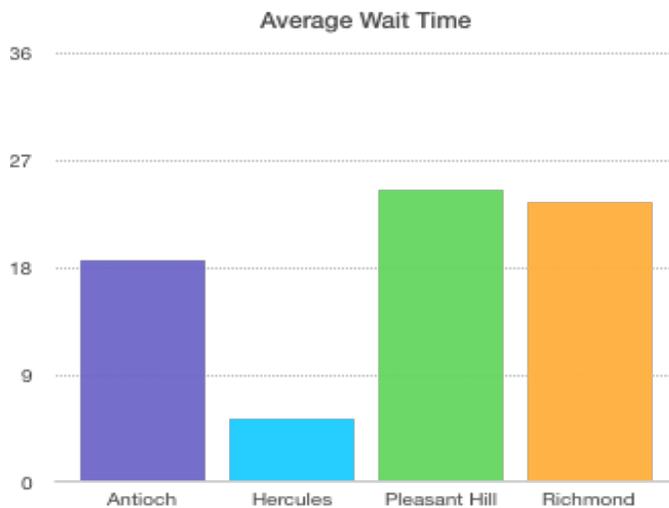
Contra Costa County Employment and Human Services Department (EHSD) utilizes the aforementioned Medi-Cal Service Center to maximize efficiency and best support the increasing number of on-going Medi-Cal and Non-assistance CalFresh cases. The centralized call center reduces the need for customers to physically enter any county offices, as most transactions are completed by telephone and mail. Current Medi-Cal and Non-assistance CalFresh customers can call the Service Center for assistance during business hours by calling Toll Free at (866) 663-3225, Monday through Friday from 8am-5pm. Under certain circumstances, customers may request to schedule an appointment with a worker and one will be scheduled at the office nearest to the customer's residence.

The Medi-Cal Service Center is a task-based center which processes CalFresh recertifications, Medi-Cal redeterminations, status reports, adding persons, case updates, answering eligibility questions and other tasks received during the phone shifts. In 2015, the Medi-Cal Service Center maintained 138,665 active Medi-Cal cases and answered 22,895 calls; the average service time was nearly seven minutes.

Contra Costa County Employment and Human Services Department consists of four main offices, each of which is comprised of intake and continuing cases.



In February 2016, a total of 19,631 customers were seen at department offices. The average wait time varied at each office, but the wait time was between five minutes, twenty-three seconds and twenty-seven minutes, forty-six seconds. The county's waiting time goal is nineteen minutes, thirty-six seconds. The average service time ranged from five minutes, three seconds to ten minutes, fifty-one seconds. The county's service time goal is seven minutes, fifty-four seconds. The maximum wait time was two hours, twenty-one minutes and fifty seconds.



If the customer had an appointment, the average wait time range was from two minutes, thirty seconds to twelve minutes, eighteen seconds. Customers were compelled to enter our offices to apply for benefits, interface with the worker, provide verifications and pick up Electronic Benefits Transfer and Medi-Cal cards, most of which, can be self-serviced by the MyBenefits CalWIN/MyBenefits CalWIN Mobile Application.

Customer usage of MyBenefits CalWIN is trending positively as the Contra Costa County Employment and Human Services Department received 10,185 MyBenefits CalWIN CalFresh applications, 3,719 MyBenefits CalWIN Medi-Cal applications and 2,223 MyBenefits CalWIN CalWORKs applications for the year of 2015.

According to the first quarter of MyBenefits CalWIN statistics, Contra Costa County Employment and Human Services Department has received 2,588 MyBenefits CalWIN CalFresh applications, 1,037 MyBenefits CalWIN Medi-Cal applications and 495 MyBenefits CalWIN CalWORKs applications. These statistics demonstrate that Contra Costa County residents are knowledgeable of the advantages of MyBenefits CalWIN, but there is need for improvement in terms of educating customers about its availability.

Most recently, Contra Costa County Employment and Human Services Department conducted a technology survey in order to determine if its customers have a working computer, a smartphone, reliable internet access and comfort of using mobile applications. The results are pending, but the preliminary results appear that a significant number of customers own or have access to a computer and/or a smartphone with reliable internet access.

### **Recommendations**

As a result of this case study and the opportunity to interact with various stakeholders and conduct this research, the following recommendations for Contra Costa County

Employment and Human Services are summarized below.

- Contra Costa Employment and Human Services Department should begin to advertise and educate Welfare to Work customers of the advantages of logging into MyBenefits CalWIN/Mobile Application. This will enable the Welfare to Work customers to become more familiar with MyBenefits CalWIN/Mobile Application, and in the process, the department will prime our Welfare to Work customers to become Lobby Greeters.
- Although each office already currently employs a lobby greeter, due to the extremely high lobby traffic each office is subjected to, the introduction of a new position (WEX worker) should be considered. The WEX worker would solely be dedicated to promoting MyBenefits CalWIN/Mobile Application. This new position can be piloted in one of the four main offices. By piloting this position, a measureable baseline can be established that can be evaluated prior to implementation to other offices.
- The department should also to invest in a tablet and provide free public Wi-Fi. This modest investment is necessary for the dedicated greeter to appropriately educate the customer in real-time. Additionally,
- The county should insert MyBenefits CalWIN informational flyers in the premade Intake and Field CalWORKs, CalFresh and Medi-Cal packets. The county should also engage community based organizations to publicize the availability of MyBenefits CalWIN/Mobile Application in order to maximize utilization of this resource.
- The agency should establish performance measures in order to effectively evaluate the success of a separate, dedicated lobby greeter. Key measurables can include decreased lobby traffic and the reduction of wait time. Given the county has established statistical

data regarding the number of persons entering our lobby and wait times, fiscal impact can be quantified through decreased number of customers entering our lobbies. A significant fiscal benefit could possibly result in the reduction of one full-time equivalent receptionist.

- In order to expedite the process and familiarize customers with this resource, Contra Costa County will want to create a detailed yet brief visual presentation that can loop on existing lobby monitors. Presentation content would include how to create a MyBenefits CalWIN/Mobile Application account and outline the benefits of the account.

These recommendations will allow Contra Costa County Employment and Human Services to continue to integrate technology into its business model and continue to explore different approaches in order to improve customer service and increase efficiencies.

### **Acknowledgements**

I would like to extend my sincere appreciation to Michael Roetzer, Administrative Services Director, Employment and Human Services Department, Laura Cox, EHSD Division Manager and Yrma Villarreal, Appeals Supervisor for giving me the opportunity to attend the BASSC Executive Development Program. I would like to thank Santa Clara County Social Services Agency for its generosity of time and support, in particular, Denise Boland, Director of Employment and Benefits Services, and Erika Rivera-Garcia, Social Services Program Manager. In addition, I would like thank Patricia Nunez, Heather Mitchell and Pandora Leininger for their informative PowerPoint presentation regarding MyBenefits CalWIN. Lastly, but certainly not least, I would like to thank the BASSC Liaisons, Mickey Williams, EHSD Division Manager and Maria Sanders, DEBS Staff Development and Training Manager, for their behind scenes coordination.