

**SANTA CRUZ COUNTY HUMAN SERVICES DEPARTMENT'S
CUSTOMER EXPERIENCE 2.0 AND TECHNOLOGY LEAD THE WAY
TO A WORLD CLASS CUSTOMER SERVICE EXPERIENCE**

Delfina Morris

EXECUTIVE SUMMARY

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

The County of Santa Cruz Human Services Department (SCHSD) redesigned customer's services process, known as Customer Experience 2.0 (CX2.0),¹¹ by developing a new customer experience service model called We Care. We Care focuses on delivering optimal customer service to make customers feel welcome, confident and respected while receiving the assistance they need, such as CalFresh, CalWORKs and Medi-Cal.

This case study explores Santa Cruz County's approach to change the culture by focusing on customer service and using technologies for delivery of services.

¹ Stewart, A. – Santa Cruz County of Santa Clara
Inter-Agency project for 2016

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Background

The continuous implementation of the Affordable Care Act (ACA) now means that almost one in three residents is receiving some form of public assistance. With increased service demands and decreased staffing, the Santa Cruz Human Services Department (SCHSD) identified the need to have a flexible workforce and technology that would simplify workload management. The Employment and Benefit Services Division (EBSD) supports the Human Service Department's (HSD) mission by providing vital benefits and services, such as CalFresh assistance, health care benefits, cash assistance and employment services. The EBSD reclassified all of its Level I and II Eligibility Workers to one classification of Benefits Representative (BR). Benefits representatives have the critical role of determining initial and continuing eligibility for individuals and families without job classification restrictions. EBSD's goal is to consistently provide an "excellent customer experience" by ensuring that both internal and external customers feel respected and informed.²

EBSD developed the We Care model after counties were expected to assist consumers enroll in Covered California or Medi-Cal due to ACA. The huge volume of new customers gave the county the opportunity to assess all aspects of the customer experience, leading to the decision

² Stewart, A., and Peterson, K., 2014

that while staff was providing a high level of service in the exiting model, it was time to introduce a new approach for services in this new environment.

The EBSD redesigned every aspect of the customer service experience and provided its employees with new tools to support customer service. The department also launched new technologies to support the new We Care service model. A couple of examples are the introduction of a Task Management application (Task Tracker) and the creation of a check-in kiosk.³

We Care Model

We Care is a customer service model created to deliver an optimal customer service experience of public assistance programs in Santa Cruz County. This is performed through the effective application of cultural awareness, operating knowledge of technology, and the customer's satisfaction of the service delivery experience with the Human Services Department.

The goal is to focus on delivering an optimal customer experience and to concentrate on providing customers with a positive, helpful experience to make them feel welcomed, respected, informed and empowered. Horizontal integration of benefits is provided to clients who are requesting/receiving assistance to ensure customers have access to a wide range of services, including healthcare, nutritional assistance, cash aid, employment and training in a comprehensive and effective manner. With the effective use of We Care during phone contacts and face-to-face interactions, the Benefits Representatives deliver a uniform customer service experience. The outcome is customer satisfaction, and access to effective and caring service.⁴

³ SCHSD, the H files, 2014

⁴ SCHSD, facilitator guide text, 2015

Operational Framework:

The Operational Framework of the We Care model illustrates the four components of a customer's contact with the Department of Human Services. In general, customers have three basic needs: food, medical care and/or cash aid. Cases fall into two categories: new applications or existing cases. Clients are trying to obtain and keep benefits as long as possible. There are three ways where customers will interact with the department: in person, on the phone, or on line via Benefits CalWIN website.

There are three outcomes a customer may experience: the customer may be approved/renewed, denied/discontinued or placed in a pending status that requires additional verifications.

Depending on the client's needs, he or she may be referred for additional services within the agency or to community based organizations.

We Care Works by:

- Creating customer service standards with feedback from all levels of staff
- Recognizing the dialogue flow from beginning to closing
- Mirroring Santa Cruz County Standards and values throughout the process flow
- Evaluating and reviewing the level of services being offered through Quality Assurance call reviews, face-to-face reviews, and essential performance indicators

There are six phases of the We Care model: (1) Welcome and Personalize Greeting; (2) Engage and Clarify Expectations; (3) Communicate and Gather Information; (4) Address Customer Needs; (5) Resolve Questions and Concerns; and, (6) End on a Positive Note.

In the Welcome and Personalize Greeting stage, the greeter uses the Check-in Kiosk to acknowledge the customers when they arrive and allows them to sit down instead of waiting in line. With this system in place, customers are able to do other activities, such as reading the information scrolling on the marquee or accessing the internet using the free Wi-Fi provided by the office. They do this while waiting on a virtual queue knowing their place in line is secure. Santa Cruz County is currently piloting Wi-Fi in its lobbies.

For the Engage and Clarify Expectations phase, the BR will confirm the reason for the customer's call or visit, validate customer's personal household information by developing some rapport with clients, and explain horizontal integration of services. They inform the clients of all possible benefits they might be entitled to receive.

In the Communicate and Gather Information phase, the BR identifies customers' needs, gathers information, reviews case comments and completes applications or tasks to confirm a customer's personal information.

To Address Customer Needs, the BR determines potential program eligibility, explains case status and timelines and provides options including referrals to help meet other customer needs. In an effort, to foster and maintain retention of benefits SCHSD introduced Text Messaging to remind customers to turn in a SAR 7 and were given permission to text them. Text Messages are sent out in two languages, English and Spanish. Also Santa Cruz County has developed a video with detailed instructions on how to complete a SAR7; it is posted on the web page BR refers clients to who need assistance with completion through a web page link.

Under Resolve Questions and Concerns, the BR verifies the understanding of case status and next steps, addresses questions and concerns the clients may have and confirms customers' needs have been met.

To End on a Positive Note, the BR provides information to the customers regarding future SCHSD contact and thanks the customers for their time.⁵

Santa Clara County Social Services (SSA) “No Wrong Door”

Like other counties, Santa Clara Social Services Agency (SSA) is looking for new methods to improve customer service for both internal and external customers.

Santa Clara County Social Service Agency Department of Employment and Benefits Services (DEBS) implemented Health Care Reform (HCR) effective January 1, 2014 as specified in the Affordable Care Act (ACA) and began to pre-enroll individuals for all coverage options.

The goal of Affordable Care Act (ACA) is to promote a “No Wrong Door” policy, which:

- Provides High Quality Customer Service that is timely, accurate, and friendly in person, by phone, via kiosk or on line.
- Ensures individual enrollment in all available coverage without asking the question “Who is eligible?”
- Coordinates Services, affording families the opportunity to apply for other services (e.g., CalFresh, CalWORKs) so that applicants do not need to provide the same information to multiple entities.

⁵ Video, facilitator guide, 2015
We Care Staff Guide, 2015

County offices have devoted staff to assist residents who come to SSA offices requesting assistance enrolling in Covered California and Medi-Cal. The county also dedicated five Health Care Reform (HCR) Intake Units of Eligibility Workers IIIs to support applications from the various portals. The EWIIIs in the HCR units are responsible for processing Modified Adjusted Gross Income (MAGI), Medi-Cal, Advanced Premium Tax Credit (APTC) and other service applications including California's Children's Health Insurance Program (C-CHIP) and CalFresh walk-ins. Santa Clara County partnered with Community Based Organization (CBOs) to provide information regarding the ACA to our community. The HCR units are readily available during open enrollment by providing extended hours to assist those who call Covered CA for assistance, are deemed eligible for Medi-Cal, or need assistance with plan selection.

This case study examines Santa Cruz County's "Customer Experience 2.0 & We Care Model." The physical improvement of the SCHSD reception lobbies has significantly contributed to the overall efficiency and better customer experience.

Recommendations

Based on this case study, it is recommended that Santa Clara County Social Services explore the following options:

- Install scanning stations in each interview room to allow Eligibility Workers to scan documents while conducting face-to-face interviews with customers. This will lead to cost savings for Santa Clara County staff using less paper, EWs not utilizing copy machines, therefore, saving time and the prevention of lost documents. This will streamline the current process.

- Dedicate a Marquee/Monitor in the lobby to display information to keep customers informed of all the services available in the community since the county does not provide this type of information in its lobbies.
- Utilize text messaging to remind clients that are required to turn in a SAR 7 for the month, to inform them the SAR 7 will be arriving in the mail and to remind them to turn it in as soon as possible. On the 15th of the month, send out another message to those who have not turned in the income report as reminder. The text messages could be sent out in the main languages for Santa Clara County --- English, Spanish and Vietnamese. DEBS will implement a Text Messaging Pilot program with CalWORKs clients. The pilot will consist of six CalWORKs units. This will be a worthwhile expansion of service for the clients.
- Develop a video with detail instructions on how to complete a SAR 7 and post it on our web page; or, send the link by text to all clients who need assistance completing the SAR 7 and have agreed to receive texts from us.
- Develop a standardized customer service training to assist our staff in providing an optimal customer service experience that makes clients feel empowered and respected by creating a training guide for staff similar to Santa Cruz County's "We Care Model." This could be included during induction training for AD's and as refresher training for the remaining of EW staff.

This will improve and strengthen Santa Clara County Social Service delivery and relationship with customers and community partners.

Conclusion

Santa Cruz County is meeting its goals of improved customer service and keeping customers informed and empowered, while receiving public assistance through the We Care model. The lobby/waiting room is welcoming; staff are knowledgeable and friendly; customers are served without delay; and, information is readily available. Face-to-face interviews are conducted in private interview rooms painted in pleasant, calming colors and are decorated with agency-appropriate style. The rooms are also equipped with scanners so that the BR staff can scan documents while conducting the face-to-face interviews. Also, a copy of the high level We Care steps, the HSD mission statement and pictures of families are on the walls with the intent to make customers feel accepted and respected by Benefits Representatives. Customer language needs are also addressed by appropriate staff. The Benefit Representatives are aware and knowledgeable of the functionality of the We Care model.

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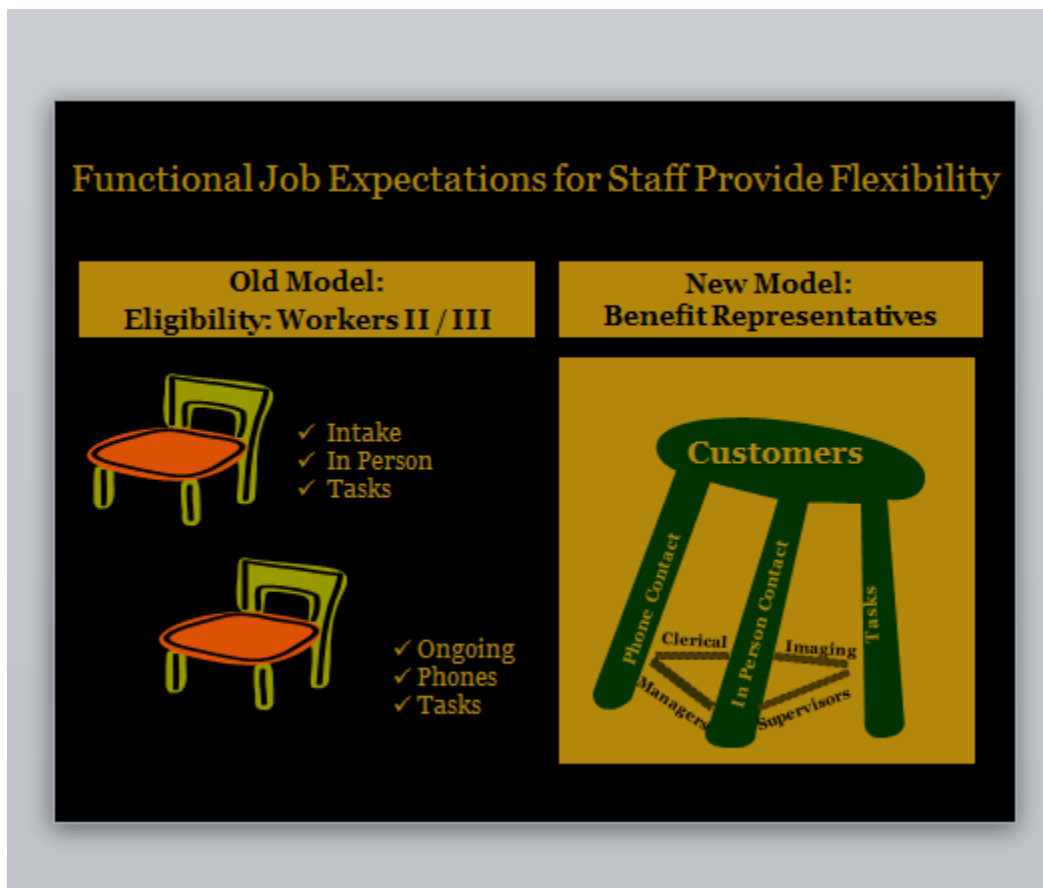
Santa Cruz County inter-agency project for 2016

Appendix

- A. Comparison chart Old Model vs. New Model.
- B. Integration of technology with customer experience.
- C. Operational Frame Work

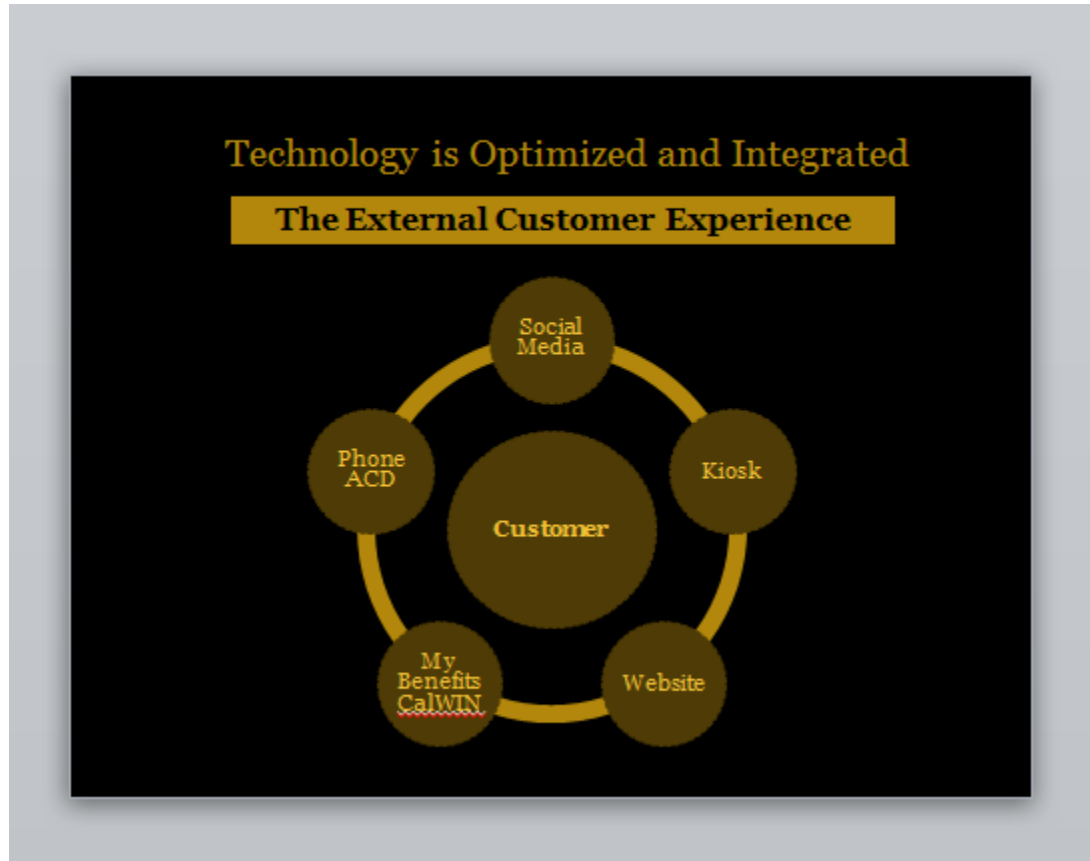
Appendix A

Santa Cruz County: Comparison chart Old Model vs. New Model.



Appendix B

Santa Cruz County: Integration of technology with customer experience.



Appendix C

A. Santa Cruz County: Operational Frame Work

