

Solano County Health and Social Services Benefits Action Center's One & Done Business Model

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EXECUTIVE SUMMARY

The core of social services is to provide a service to people and to do it well. It is a never-ending challenge to provide those services within the means of available resources and staff, especially with the ever-changing landscape of federal and state regulation and fluctuations in funding levels. Solano County's Health & Social Services Benefits Action Center, the county's primary call center for non-assistance CalFresh and Medi-Cal continuing cases, felt the impact of higher case counts, casework, and call volumes and were concerned with meeting service levels. In response, they sought to redesign their service delivery in a more effective and efficient method using available resources and staff. The One & Done

concept took almost two years to develop and implement, with the help of staff and stakeholders to analyze their business process. The concept of the One & Done Model is to handle all of a caller's needs within one phone call whenever possible without regard to whom the case may be assigned. This model has led to decreases in call volume and increases in completion of work, along with happy customers and staff. The Contra Costa Employment Human Services Medi-Cal CalFresh Service Center has also felt the impact of changes in case counts and phone call volumes and could benefit by utilizing Solano's One & Done Model.

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Introduction

A social services organization's responsibility is to provide services to people. This includes delivering quality services efficiently and effectively while also treating the customer with compassion, courtesy, consideration, kindness, respect, and dignity.

Contra Costa County

Like many counties, Contra Costa maintains a task-based service center, referred to as the Medi-Cal CalFresh Service Center (MCSC), to administer the continuing federal and state Medi-Cal and CalFresh cases for the county. The MCSC was formed in 2005 to help mitigate the effects of budget cuts that resulted in limited resources and workload issues. The MCSC case numbers greatly increased in 2014 with the implementation of the Affordable Care Act (ACA). In January of 2014, before the full impact of ACA could be felt, MCSC had approximately 47,300 active Medi-Cal cases and 22,530 active non-assistance CalFresh cases. In January 2019, five years after ACA implementation, counts are significantly higher at the MCSC. The Medi-Cal cases have increased by 185% to approximately 135,000 Medi-Cal cases and the CalFresh cases increased by 127% to approximately 51,330 non-assistance CalFresh cases. Of the 135,000 Medi-Cal cases, a little over one third (47,750) include the CalFresh program.

The increase in Medi-Cal cases from ACA has led to a large case-per-worker ratio. MCSC is currently staffed with a mixture of single program workers in the Eligibility Worker (EW) classification who are only able to work in one program and combo workers, known as Social Service Program Assistant

(SSPA) or Medi-Cal Program Assistant (MPA), who are able to process work in both the Medi-Cal and CalFresh programs. Of the 111 workers assigned to MCSC, 64 are EWs assigned to Medi-Cal, 32 are EWs assigned to CalFresh and 15 are SSPA/MPA combo workers. Comparing the number of workers available to work in a specific program to the number of active programs, there are roughly 1,645 Medi-Cal cases per EW, SSPA/MPA combined, and 1,092 CalFresh cases per EW and SSPA/MPA combined. Due to the limited number of SSPA/MPA available to process combo cases and the increase in the volume of tasks, the tasks that could affect both the Medi-Cal and CalFresh programs are often assigned to EW workers from each program.

In the MCSC's current model, employees work as a phone agent 40% of the time and are assigned to process tasks the remaining 60% of the time. The assistance that a phone agent is able to provide to a customer over the phone largely depends on if there is currently a worker assigned to the customer's case for an existing task or not. For calls received that do not have an assigned worker, the phone agent will process the customer's case to full completion within their assigned program. Any outstanding unassigned tasks are assigned to the phone agent for processing any necessary follow-up work. Single program workers acting as phone agents seek assistance from unit coworkers to handle the caller's immediate needs regarding another program while non-immediate needs are tasked to a worker in that specific program. For calls received that have an assigned worker, the phone agent will provide information about the case and document the call but will not take action on

the case. Instead, the customer will be directed to the assigned worker handling the task.

As the worker-to-case ratio has increased, the ability for MCSC to stay current with processing tasks has been and continues to be challenging. It has led to a backlog of unprocessed tasks. In addition, the phone call volume has increased along with the number of cases, which has led to a decrease in timely processing of tasks. The larger call volume has increased to an unmanageable level causing excessive call wait times, a higher percentage of call abandonments, increased customer frustration, and decreased worker morale.

MCSC has implemented processes to help alleviate the call volume and workload. One of these processes is the “Phone Queue Call Out”. It is used when the number or wait time of calls in the queue reaches a certain peak and requires all workers to login to accept phone calls to clear out the queue. To compensate, the workers receive a task reduction credit for the time spent logged onto the phone system.

A more recent and effective process put into place is the throttling of call traffic by capping the number of calls that are able to be in the phone queue at any given moment throughout the day. Customers who call and are unable to get into the phone queue are provided information for a website option and asked to try their call again. The throttling has shown to reduce the number of customers waiting to be served as well as call wait times and percentage of call abandonments. It also reduces the need for using the “Phone Queue Call Out” process. Unfortunately, it also means a lack of service availability for customers in excess of the established call quotas. Overtime is also utilized to help relieve the backlog of tasks.

Despite the added processes put in place at the MCSC to help mitigate the volume of calls and workload, Contra Costa continues to face challenges finding a resolution to provide the service customers deserve, based on staff and resources that are currently available.

Solano One & Done

Similar to Contra Costa, Solano County has established a service center referred to as the Benefits Action Center (BAC) for their ongoing Medi-Cal and non-assistance CalFresh cases. Solano has been impacted with the same challenges as Contra Costa including managing case and call volume increases, and had attempted numerous service models to mitigate the workload for staff and improve customer service before successfully implementing One & Done.

In February 2016, a brainstorming meeting was held to determine a more effective and efficient means of doing business. Solano County researched the various ways that resources and staff could transform into something that would provide the service level customers deserve. As a result of the collaborative meeting that was held, the concept of the “One & Done Model” was born.

The idea of the One & Done Model is to handle all of a caller’s needs within one phone interaction. Phone agents are to assist a customer with the purpose of their call, along with any outstanding tasks associated to the case for both CalFresh and Medi-Cal. The calls are to be handled all the way through to a complete resolution whenever possible, without regard for whom the case task may already be assigned. In addition, the phone agent will close out resolved tasks, request additional information, absorb unassigned tasks, or create a new task if necessary. This process is effective and efficient by productively utilizing the time a worker spends on a phone call to complete work that is already assigned or would otherwise be assigned as a task at some point. The model also focuses on managing the workload effectively by having all the tasks associated with a case pulled together, processed, and completed as one case task.

The added benefit of Solano County’s implementation of this model was that they were able to do it utilizing the existing staff and resources, without the additional fiscal cost of adding staff or ancillary systems. The only areas of potential new cost occurred around staff development for training needs and

publication of communications to staff outlining the new processes. The largest implementation expense for the One & Done concept was time and effort.

It took about two years from the birth of the One & Done idea in February 2016 to the full roll out of all units implemented by December 2017. The plan started in December 2016 with the formation of the One & Done committee that included the appropriate stakeholders: supervisors, lead workers, eligibility staff, and clerical, who were the subject matter experts and the decision makers with the authority to make the proposed changes happen. The committee conducted a thorough analysis of the banked workload at BAC and evaluated how the:

- Workload was being distributed using a round robin format to assign tasks to workers without regards to the volume of tasks being assigned or worker availability. This kept the main BAC task bucket caseload empty but left the workers with a mounting backlog of tasks that could not be addressed.
- Assignment of a case in the CalWIN system to a worker to process a task assignment created a territorial ownership of the case. This prevented coworkers, including those acting as phone agents, from working on the case. The “mine only” point of view hindered the ability of phone agents to effectively assist the customer during phone calls.
- Length of time phone agent spent on the phone assisting the customer was being monitored and tracked.
- Return of cases to workers for inaccurate benefits or dispositions for case corrections to the previous worker of record within BAC impacted the customer. This process has the advantage of increasing worker accountability and providing a learning opportunity. The disadvantage of back-and-forth transfer of the case between workers causes a delay in the processing of the customer’s benefits and negatively affects worker morale. There is also the ineffective use of the worker’s time spent returning the case when the

same amount or less time could have been used to correct the case.

After several months of discussions, taking into account the worker-to-case ratio at BAC with approximately 40,000 cases and 55 position numbers along with the knowledge that all of the eligibility staff are combo workers capable of working both the Medi-Cal and CalFresh programs, the committee developed the One & Done Model criteria. Some of the criteria include:

- Merging multiple single tasks for a case into one case task assignment.
- Limiting the number of scheduled phone hours on phone days.
- Processing a customer’s call by the phone agent, including any outstanding tasks regardless of whom the task may have already been assigned to.
- Expecting workers to take all the necessary time needed to process a customer’s call within reason.
- Clerical scheduling CalFresh RC appointments and assigning the task to workers.
- Assigning case tasks to workers on a non-phone day, excluding days of absences, and assigning tasks at a level that can be completed on the same day of assignment.
- Having cases not being returned to a previous worker for case correction within BAC, except for very specific limited reasons. Supervisors are to discuss errors with workers when brought to their attention.

Solano started using the new One & Done criteria with a single pilot unit in December of 2017. About a month before the pilot started, measures were taken to reduce the backlog of uncompleted tasks in the pilot workers caseload to a manageable level. This was accomplished by not assigning new tasks until the pilot started. This was done to allow the pilot workers time to work their backlog of tasks and was accomplished by using the enlisted BAC’s all-star

workers (referred to as Ninjas) to assist in clear out the backlog of tasks. The Ninjas were there to help with decreasing the number of tasks for the workers stage of the implementation.

Following the full implementation in December 2017 of the One & Done Model, the committee reconvened to check-in and discuss staff feedback, lessons learned and strategies for improvement. This resulted in a revised One & Done 2.0 Model that rolled out in April 2018. The core of the model remained unchanged. It was slightly restructured to increase efficiency in worker output. The modifications included a unit-based approach wherein all of the workers in an assigned unit are scheduled on the same days and times for phone shifts, case task assignments, and CalFresh RC appointments. The unit based approach provides an increase in unit stability, unit schedule predictability, an increase in the accuracy of the overall unit statistics, consistency for routine unit meetings as well as conferences, and increases the workers' and supervisors' accountability. It also builds team unity, loyalty, and morale.

Recommendation

The MCSC is continually seeking to provide customers with timely, efficient, and effective services with kindness, consideration, dignity, and respect. To assist with this, it is recommended that Contra Costa County consider implementing a model similar to Solano's One & Done. Solano has found a way with the One & Done Model to not only provide the service customers deserve, but also to increase the speed of service, reduce the overall call wait time, eliminate the backlog of tasks, and balance the workload in a manner which allows the workers to continually manage incoming tasks efficiently and effectively without increasing or decreasing the case-to-worker ratio.

To implement this concept and obtain the full desired results, Contra Costa County should consider following the strategy Solano County employed in establishing a committee that engages all the appropriate stakeholders of managers, workforce specialists, supervisors, workers, clerical, staff

development, and systems. By having a committee with various stakeholders, the staff have a sense of ownership that will make the acceptance of that change easier. For the purpose of evaluating and analyzing the MCSC's current model, utilize the lessons learned by Solano and develop a project plan for implementing a model similar to One & Done.

The information and lessons learned that Solano County has provided, along with establishment of a project team will assist in streamlining the implementation. However, due to Contra Costa County's organizational structure, the anticipated timeline to fully implement is approximately two years. One of the key elements that has made Solano County's One & Done Model successful is their worker's ability to work on all programs on a case, which allows each worker to take each case to complete resolution. The majority of the workers at MCSC are single program workers and would require a classification of SSPA/MPA to work more than one program on a case.

To transition MCSC's 96 EW positions to SSPA/MPA it will require:

- The Board of Supervisor to approve positions
- Personnel to establish a list of candidates
- Interview and hire workers
- Staff development to cross-train workers
- Systems to set up new security profiles
- Annual funding of \$989,280 to pay for the full salary of the higher classification based on figuring the annual cost difference between EWIII and SSPA/MPA of average projected salary plus benefits of \$10,305 for each of the 96 EWs.

The MCSC spends nearly \$500,000 annually to pay overtime to address the backlog of uncompleted tasks. Unfortunately, the time spent working overtime is not included in the time study and therefore prevents the county from accurately tracking the time workers are spending on program tasks.

One of the expected results of the One & Done Model is a decrease or possible elimination of the need for overtime. Eliminating overtime has two benefits. First, overtime costs saved could be used to offset the increased classification expense; second, it

would allow the county to more accurately monitor where workers are spending their time.

Considering the length of time it may take to fully implement a new model, MCSC may want to utilize the project team to analyze if there are elements in Solano's design that could be implemented within the parameters of the current worker job classifications and in a much shorter time frame.

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References

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