

Video Conferencing: An Innovative Way to Conduct Client Interviews

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EXECUTIVE SUMMARY

Alameda County Social Services Agency (SSA) is utilizing technology to enhance the client experience and services, whether in office lobbies or adding the option to apply for benefits via the benefits CalWIN app. The majority of Americans (77%) own a smartphone and one-third of U.S. adults own a desktop or laptop computer. The use of this technology opens doors for new business processes to be incorporated in the way SSA reaches its clients and community. SSA will need to continue to incorporate innovative ways to make its services more accessible and convenient.

Contra Costa County Employment and Human Services Department (EHSD) has taken an innovative approach to client interviews. EHSD has begun piloting video conferencing as a new technique to interview clients via Skype. This approach has proved beneficial to EHSD, allowing for equitable

case distribution among eligibility staff, which indirectly led to an increase in morale. The client satisfaction rate for client-worker interaction during video conferencing is at 98% based on EHSD client survey results. Video conferencing has also reduced transportation barriers for clients, allowing clients to complete their interviews at the locations closest to them.

Adding video conferencing to SSA's current technologies can enhance services to clients and prove beneficial for the agency. Using this technology will eventually lead to less foot traffic in office lobbies, provide additional options for reaching out to employment services, clients, and will meet civil rights mandates by utilizing video conferencing for American Sign Language (ASL) interpretation.

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Introduction

We are currently living in a time when technology is growing faster than we can keep up. Most Americans (77%) own a smartphone, up from 35% from the Pew Research Center's first survey in 2011. Along with mobile phones, one-third of U.S. adults own desktop or laptop computers, while half own tablet computers. Alameda County Social Services Agency (SSA) is using this technology to provide client access to services, streamline programs, and enhance the efficiency and effectiveness of services. SSA currently utilizes Benefits CalWIN as an online portal in which clients can apply for CalWORKs, CalFresh, and Medi-Cal benefits, as well as the E-SAR 7 to allow clients to submit their state-mandated SAR 7 report online along with necessary verifications. SSA is also in the early phases of implementing the telephonic signature process which will allow CalFresh applications to be submitted over the phone. SSA should continue to think of innovative ways to provide access and convenience to services, embracing the technology that surrounds us.

Contra Costa County Employment & Human Services Department (EHSD) has taken an innovative approach by beginning to pilot video conferencing for interviewing clients. This case study examines EHSD's effective use of technology to enhance services and capture the best practices that could be leveraged by SSA for continued enhancement to services.

Background

As of 2017, Contra Costa County had a population of over 1.14 million living within 804 square

miles. In an effort to address the growing population, office space issues, and a subsequent increase in CalWORKs ongoing caseloads in East County (Antioch and Richmond), and to allow for more equitable case distribution among eligibility staff county-wide without specific physical location considerations, video conferencing was proposed. Video conferencing provides an alternate method to the face-to-face interview mandate required for CalWORKs. This innovative option would provide relief to overpopulated building space and maximize efficient use of building resources, allowing new staff to be evenly disbursed in less-populated county buildings located in other portions of Contra Costa County.

With the release of All County Information Notice (ACIN) 1-60-30 by the California Department of Social Services (CDSS) in 2013, which allowed for a client to not have to go into an office to provide an original ink signature on documents, the door was opened for new and innovative ways to provide services. In January 2017, All County Newsletter (ACL) 17-57 was released by CDSS due to new developments in county business processes and technology changes. This release provides a detailed range of options that may be used in meeting the requirement of an electronic signature.

- Handwritten signature input onto an electronic signature pad
- Handwritten signature, mark, or command input on a display screen or stylus device used to sign a document displayed on a touch screen
- Digitized image of a handwritten signature that is attached to an electronic record

- Typed name (e.g. on an online application)
- Unique identifier (e.g. code, password or PI)
- Electronic recorded sound (e.g. voice recording, telephonic signatures)
- The process of using a mouse to click a button (such as an “I Agree” button)
- Digital signature

The options listed above allowed counties more flexibility on how services can be provided to clients. After a review of state policies and mandates that would support video conferencing, funding was secured from the technology fund from IT and the video conferencing pilot was ready to move forward. In August 2016, the video conferencing began at EHSD with the first stage.

The First Stage of the Video Conferencing Pilot

The first stage of the video conferencing pilot started with a single unit of Eligibility Workers (EWs) located in the Richmond office. This opportunity was opened up for volunteers. The EWs selected for the pilot unit would conduct video conferencing for CalWORKs renewal interviews with clients in the Richmond office, the same office they were located. The Richmond location converted a room off their lobby that was dedicated to Benefits CalWin. The room was underutilized but was equipped with the technology needed. However, there were some modifications that needed to be completed. The standard monitors needed to be replaced with touch screen monitors. These monitors would be used by the clients. Individual stations were created with two noise cancelling headphones per station, monitor cameras, taller cubicle partitions to ensure client confidentiality, and styluses for clients to sign documents electronically.

The Skype for business application that is included in the Microsoft suite is used to conduct the video conferencing. The Compass document system is used to collect the required signatures from the client by pushing the required forms from the EW to the client via the touch screen monitor. Training was

provided to the initial staff by the training department that provided staff instruction on how to use Skype and how to present giving and taking control of the document for signature. In piloting the first stage of video conferencing in the same office as the client was located, it allowed for the pilot to test the current technology and ensure that clients' benefits and services would not be delayed or impacted. Clerical staff are stationed inside the video conferencing room to check the customer in, get the computer set up and provide any assistance that is needed. There was one initial EW unit for the pilot for about 60 days, and then additional units were added at the Richmond location. After the transition period of the first stage and once the process was fluent, video conferencing was implemented in another location.

The Second Stage of the Video Conferencing Pilot

The second stage of the video conferencing pilot opened up the video conferencing to the Antioch location, which is the furthest distance from the Richmond office. With the new addition of the Antioch location being part of the video conferencing, it would allow the option to conduct client interviews from one office to another. A video conferencing room was set up in Antioch with interviewing stations equivalent to the Richmond location.

A video conferencing calendar was created in Outlook to schedule the interviews and select the office and station to be used. This calendar is used to prevent double-booking of interview stations and assist with checking in clients. Training for this stage was done by peer-to-peer shadowing which allowed staff that was already doing video conferencing to showcase their knowledge and provide best practices. EHSD also created a video conferencing manual for staff that includes a video conferencing workflow for clerks and EWs.

The Hercules and Pleasant Hill locations were next to implement video conferencing, allowing all offices to have video conferencing capabilities. The Hercules office also has a designated video

conferencing room with designated video conferencing stations. The Pleasant Hill video conferencing room was optimal as its location was right off the entrance of the building and housed a large table in the center of the room for children to draw or do other activities as their parents or caretakers were conducting the video conferencing interview. All locations were equipped with the same equipment, but the individual video conference stations would vary in design and set up due to the restrictions of the designated room.

The Third and Final Stage of Video Conferencing

With success in both initial stages, EHSD's ultimate goal is to have video conferencing available outside of the county offices by allowing clients to access video conferencing via their own personal devices. This technology will allow clients to have more flexibility in meeting their appointment times by utilizing smartphones and other video capable technology from their homes. This service delivery can minimize barriers imposed on clients to travel to offices, especially those traveling with small children or those that are employed and have limited time to make it into an office. A client survey conducted by EHSD in December 2018 shows 96% of clients would prefer to complete their CalWORKs renewal at home.

Skype would be used for the video conferencing but the challenge that EHSD is having is being able to capture the required signatures on forms. Currently signatures are not captured via smartphones, tablets, and personal computers. EHSD is working on using Adobe Sign, which is similar to DocuSign, as an option. Another option being looked into is merging video conferencing with telephonic signature as that would eliminate the signature requirement. With telephonic signature you would need to keep a recording of the voice attestation which is currently already being done with the current telephonic signature process. The executive team has approved this next stage in video conferencing and a team is working with IT to come up with a viable process.

Results

Video conferencing in Contra Costa County has enhanced customer service utilizing technology. It has allowed flexibility in appointment schedules and has provided relief to transportation issues experienced by clients getting to offices that are not located near them. Video conferencing has allowed for equitable case distribution among eligibility staff, which has indirectly led to the increase of morale of the field staff in East Contra Costa County. Video conferencing also reduced foot traffic in the lobbies; this was not an immediate result but was felt about a year into the pilot.

With the implementation of video conferencing, a survey was and still is provided to clients. The vast majority of clients (97%) state the video conferencing process was smooth and there is a 98% satisfaction rate for the client's interaction with the worker during the interview. During a demonstration of the process provided by an EW at the Hercules office, it was stated that the video conferencing process was easy for the EW to conduct and convenient for clients as it provided flexibility and less stress for clients to try to get to offices that were not close to them, especially when needing to take public transportation.

Video Conferencing in Alameda County

Alameda County SSA currently assists 11.3% of Alameda County residents. Alameda County is home to over 1.5 million people living in 14 incorporated cities as well as six unincorporated communities. SSA should continue to utilize modern technology to provide services to our clients with more convenience. Video conferencing is an opportunity to reach our clients in a new and innovative way, reducing the need to have to come into an office. Video conferencing provides a creative way to have a face-to-face interview and provide convenience for a client to be at home on their own personal device. Eye contact is a very important aspect to interviewing as it helps regulate conversation and it fundamentally communicates warmth, concern, and empathy.

With video conferencing, you are able to capture eye contact within the interview. Video conferencing provides this experience, as opposed to a telephone interview that will not capture face-to-face contact.

SSA currently has the technology needed for video conferencing; the Skype for business is already available to staff as part of the Microsoft suite. Current computer monitors are equipped with cameras. Depending on whether in-office video conferencing stations would be viable, additional equipment might be needed. This would include equipment such as sound-reducing headphones and a touch screen monitor for clients (if touch screen monitors do not come equipped with cameras, this would be an additional expense). SSA would need to assess cost as it will vary based on the equipment selected; a cost benefit analysis should be completed. SSA currently uses DocuSign for business and this option can possibly be incorporated with Skype to push the required forms to the client for electronic signature. Further testing and review would need to be done by the IT department. There is also the option in the future to incorporate telephonic signature with video conferencing as SSA is in the stages to implement this process shortly. Operations would need to work with the Training and Consulting Team to provide staff training. Program Planning and Support would need to work with Operations in order to create a policy for video conferencing.

SSA should further look into video conferencing to be used in other areas of service. One area could be initial application interviews for benefits, as this could further reduce the traffic into the office lobbies, as well as benefit the client who would have the convenience of conducting the interview at home. Video conferencing could also be a viable addition to employment services to conduct one-on-one orientations, to amend welfare-to-work plans, or for appraisals.

SSA currently has outstation offices located in Livermore and Fremont. These offices do not house social workers (SW's) on site. SSA General Assistance (GA) applicants have a requirement to meet with a SW prior to their benefits being approved.

This requirement forces clients with minimal resources to travel across the county to meet with a SW. Bus tickets are provided but are an expense to SSA. Video conferencing is an option that can be reviewed to limit this inconvenience to GA applicants by incorporating a video conferencing station in our outstation offices and setting up SW interviews via video conferencing.

Video conferencing can be utilized to meet our civil rights compliance for American Sign Language (ASL). Skype can be utilized for the client, ASL interpreter, and EW for conducting the interview for initial or on-going benefits.

To keep up with the times, SSA will need to continue to incorporate technology in business practices to connect to the community. Per the Pew Research Center, the adoption of traditional broadband services has slowed as a growing share of Americans now use smartphones as their primary means of online access at home. Reliance on smartphones for online access is especially common among younger adults and lower-income Americans. In conclusion, SSA can learn from the EHSD video conferencing pilot. SSA should continue to follow the progress of EHSD's video conferencing using smartphones and personal devices and look at incorporating this into SSA business processes.

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