



# SAN BERNARDINO COUNTY TRANSITIONAL ASSISTANCE DEPARTMENT

## Service Efficiency Initiatives

Process Approach to Case Excellence

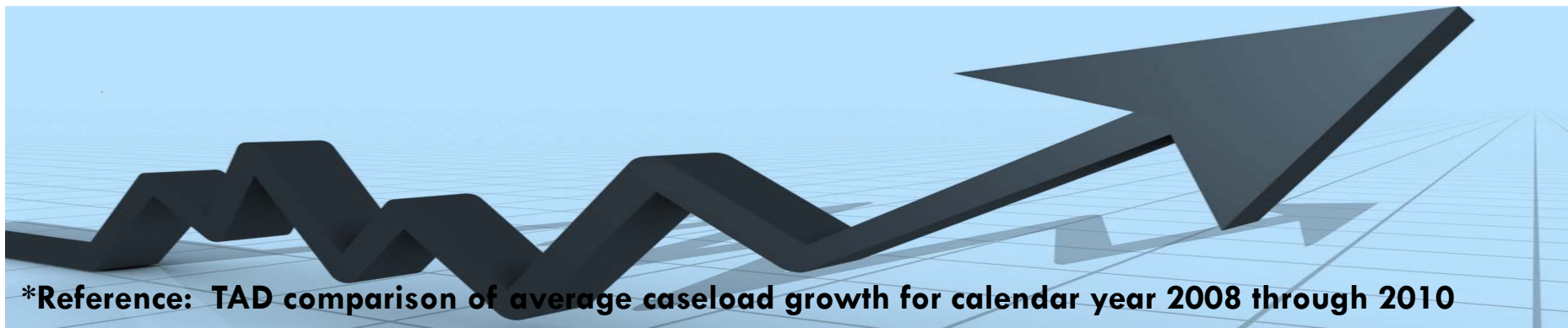
Customer Service Center

# Service Efficiency Initiatives

- Improves:
  - Customer service,
  - Efficiency by maximizing resources, and
  - Cost efficiency through streamlining operations
- Provides:
  - Equitable workload distribution, and
  - Transparency of operations and workload
  - Ownership/accountability of work completed
- Reduces interruptions, focusing time on assigned activities
- Eliminates backlog for:
  - Uncovered caseloads, and
  - Employees returning from vacation/sick leave
- Gives daily priorities and work expectations
- Promotes:
  - Teamwork, and
  - Flexibility of assignment opportunities

# Why change?

- TAD program continuing caseloads have increased since 2008\* by:
  - ❖ 107.6% for Non-Assistance CalFresh
  - ❖ 15.7% for Medi-Cal
  - ❖ 31.8% for CalWORKs



# Two main components

Process Approach to Case Excellence (PACE)	Customer Service Center
<p>County Workgroups formed Concurrent Planning Communication/Road Shows informational sessions Determine combined Go Live Schedule Determined Customer Notification Method</p>	
<p>Pre-Pace Activities Update technology Train Staff</p>	<p>Obtain building/lease/furniture Obtain volunteers for reassignment to CSC Train Staff</p>

# PACE is the

## Process Approach to Case Excellence:

- **Serve the customer:**
  - Increase accuracy and timeliness of casework
- **Keep it simple:**
  - Processes should be streamlined and consistent
- **“One and Done” goal:**
  - Avoid handoffs, complete actions to fullest extent
- **“Own” the process:**
  - Each person is accountable for his/her actions
  - Work Performance elements remain the same
- **Team approach:**
  - Share and complete the work equally
  - Eliminate backlogs
- **Flexibility:**
  - Adjust staff assignments to meet coverage needs

# Master Assignment Queue (MAQ) Structure

Currently Workload Inventories are assigned to a worker. In the Process Approach to Case Excellence (PACE) environment Workload Inventories will be assigned to a Master Assignment Queue (MAQ) not an individual worker. MAQs are recommended to:

- Have a specific program Worker Name (CW/CF MAQ I) and Worker ID assigned in sequence for daily assignments and reports.
  - Spanish Speaking Only (SSO) programs need to be in a separate MAQ(s).
- Contain a maximum limit of 2,500 programs per MAQ Worker ID.
- Allow for program specific MAQs:
  - CalFresh
  - CalWORKs/CalFresh
  - Medi-Cal
- Have one (1) Outlook Mailbox for each program for linkage to a(n):
  - Single Microsoft Outlook calendar for appointments, and
  - E-mail box.

**Note:** The number of MAQs may vary due to the district size and worker experience. Worker's will retain their current Worker IDs.



# Eligibility Worker Daily Workflow



## QR 7

- Retrieves assignments daily from:
- Designated mailboxes, and
  - MAQ Imaging queues (e-QR7)



## CalWORKs/CalFresh REs/RCs

- Reviews Outlook calendar for any transferred appointments



## Medi-Cal REs

- Retrieves assignments daily from designated mailboxes



## MSR

- Retrieves assignments daily from designated mailboxes



## PACE EWSI

- Receives assignments to complete:
- Un-worked assignments
  - District reports
  - MAQ Imaging queue
  - Released Assignments
  - Daily district priorities



## Un-finished Work

- Retains un-finished case actions:
- E-mails the Supervision Team
  - Secures mail per PII policy



## Completed Case Actions

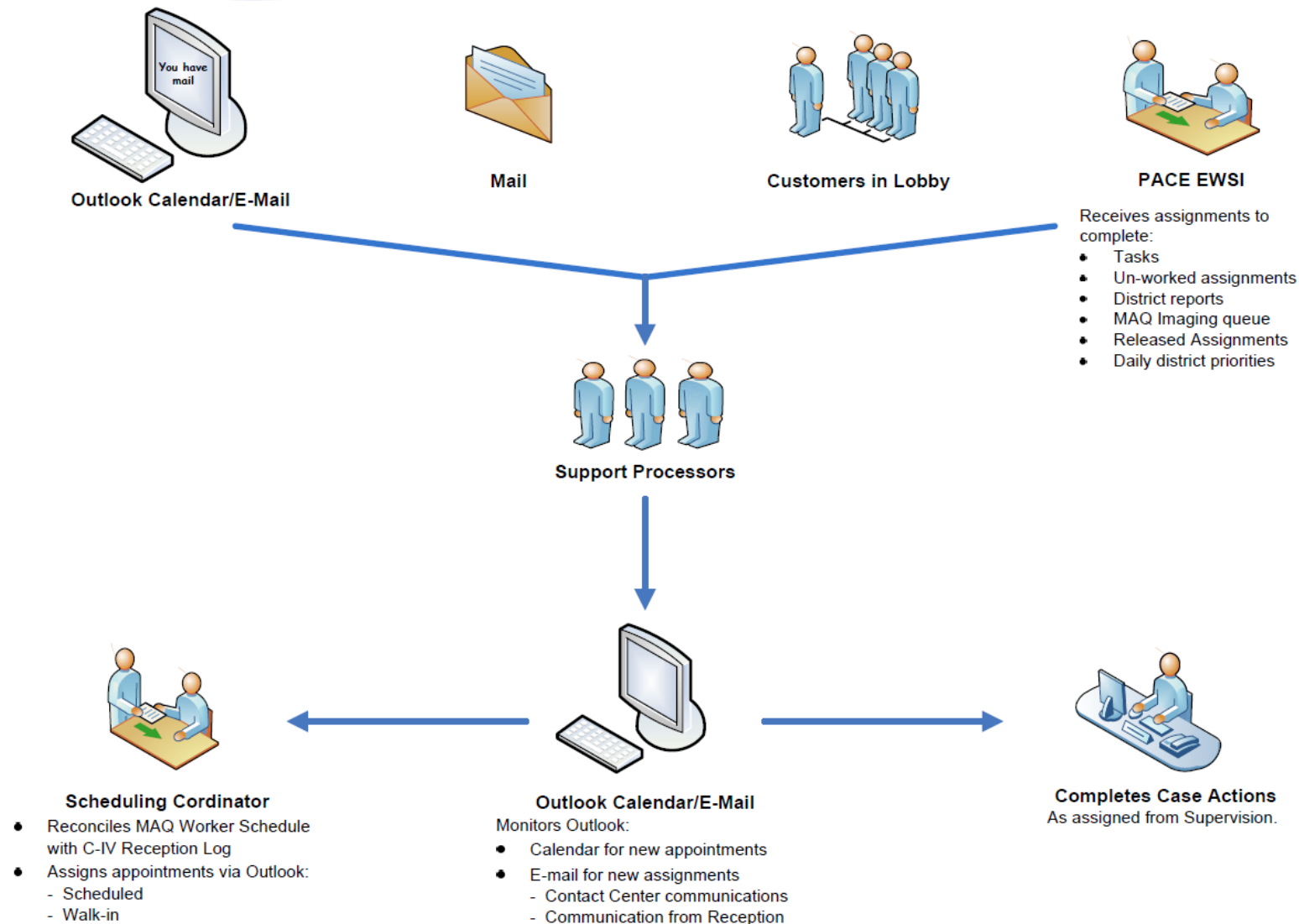
- Processes and completes case actions to the fullest extent:
- REs/RCs
  - QR 7s/MSRs
  - Miscellaneous mail
  - Tasks



## Un-worked Assignments

- Releases un-worked assignments at end of work schedule
- Returns assignments to:
  - ✓ PACE Supervision Team, or
  - ✓ Late night in-charge
- PACE Supervision Team reassigns same day and/or next day as first priority

# Support Processor Daily Workflow





# PACE Team Supervisor Concept – Assignment/Monitoring of Work

Monthly



## PACE Supervisory/Management Forecasting/Planning Team Meeting

the month prior determines:

- EWS I Team assignments (EWS I Calendar)
- Anticipated Workload for the district (PACE Planning Day Tool using LRU Adhoc)
- Master Assignment Queue Productivity (eXemplar)
- PACE EW Performance (eXemplar)
- Staff availability and assignment adjustments

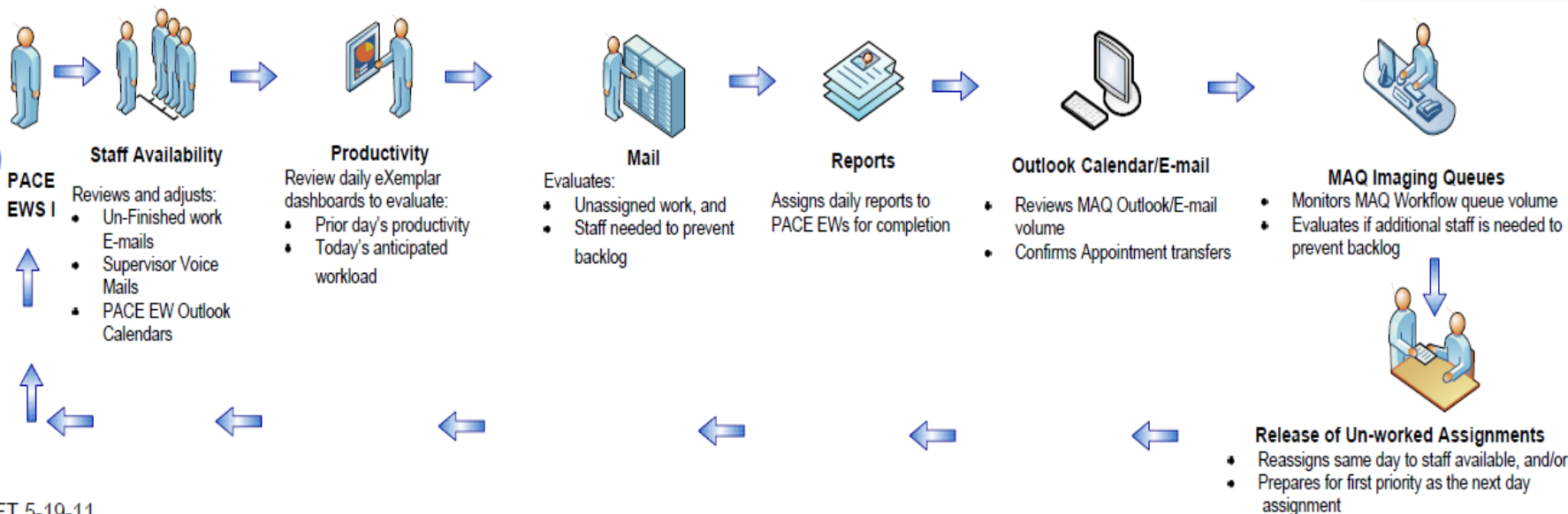


## Personnel/Staff Performance Team duties

- WPE
- EMACs
- Time Study
- Desk Audits
- Monthly Narrative
- Case Reviews
- Case Corrections
- Customer Complaints
- Observations

**Note:** Existing Performance Agreements, WPIP, and misconduct issues remain assigned to individual EWS Is.

Daily



# San Bernardino Customer Service Center

Two Locations now available!



**Site 1 – San Bernardino**  
Go Live 8/5/11

99 EW IIs/EW IIIs

11 Supervisors

2 District Managers

4 Shared Work Force Management (Staff Analyst Is)

1 Deputy Director

**Site 2 – Hesperia**  
Go Live 1/12/12

42 EW IIs/EW IIIs

5 Supervisors

1 District Manager

Both sites managed as one, calls distributed evenly to staff regardless of physical location. Work Force Management activities are completed at Site 1 for both locations.

# San Bernardino Customer Service Center

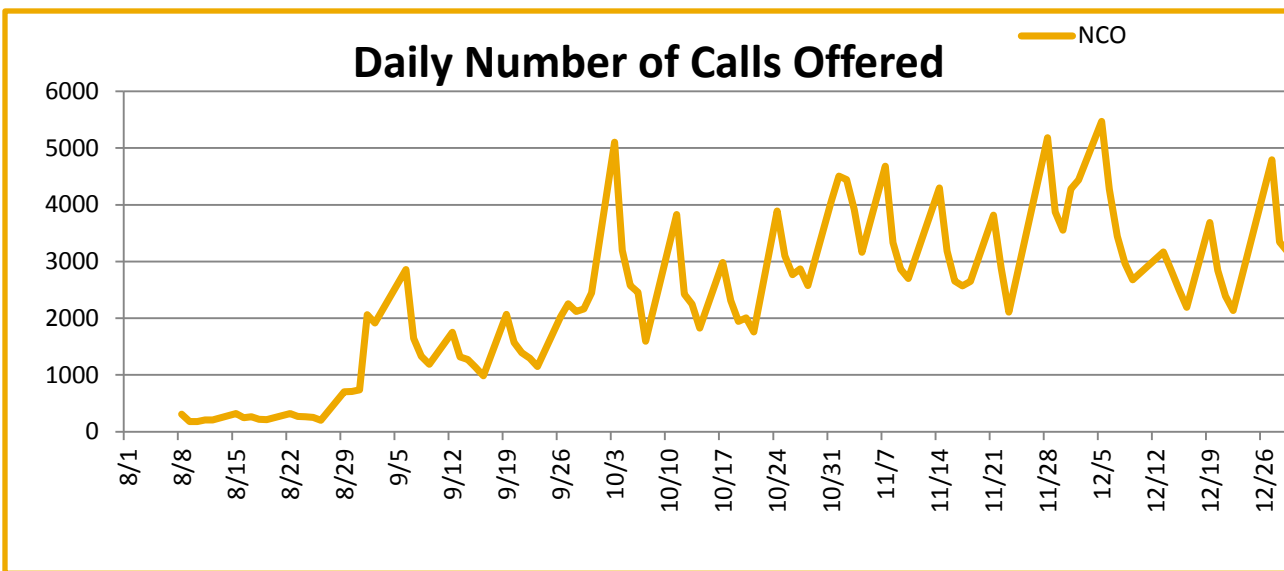
## Quick Facts

Number of calls handled August 2011 to January 18, 2012		% of total
Medi-Cal	56186	21.77%
CalFresh	35962	13.93%
CalWORKs	65438	25.35%
General Inquiry	99525	38.56%
Web Chat	1001	0.39%
<b>Total</b>	<b>258112</b>	<b>100%</b>

**Average Handle time= 10.5 minutes**  
(Talk + Wrap = Handle Time)

**Average Speed of Answer = >2 min\***  
\*additional 43 agents added January 12

**77% of caseload served – to date**  
**100% of caseload 1/23/12**



Average Number of calls of calls per day = 2336  
Average Number of calls per day – **12/2011 = 3505**

**Chart displays wave roll out and increase of calls per day over time. Peak times are related to first of the month and first working day after any holiday.**

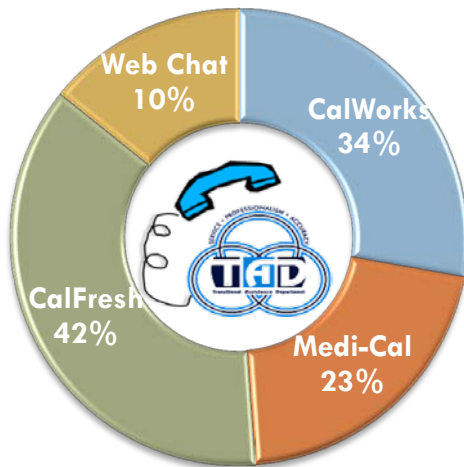
# Customer Service Center Staffing

## Quick Facts

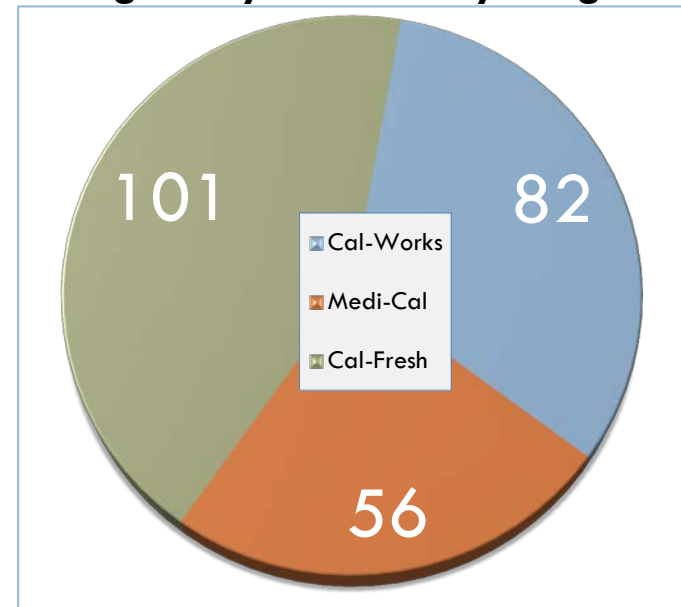
Hours are 7:30 to 5:30 M-F

- 128 EW IIs
- 13 EW IIIs
- 16 Supervisors
- 41 Bilingual EWs
- 3 District Managers
- 4 Staff Analysts (Work Force Management)
- 1 Deputy Director
- 18% of calls are Spanish Speaking

### Workforce Distribution



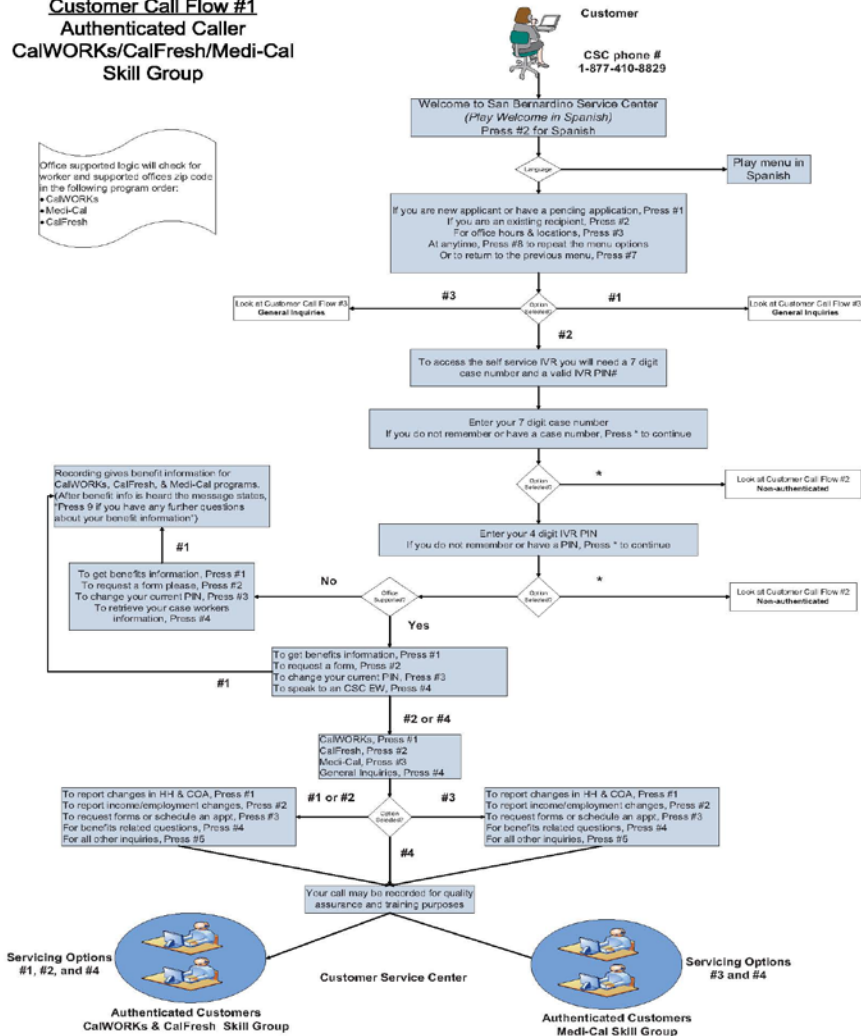
### Eligibility Workers by Program



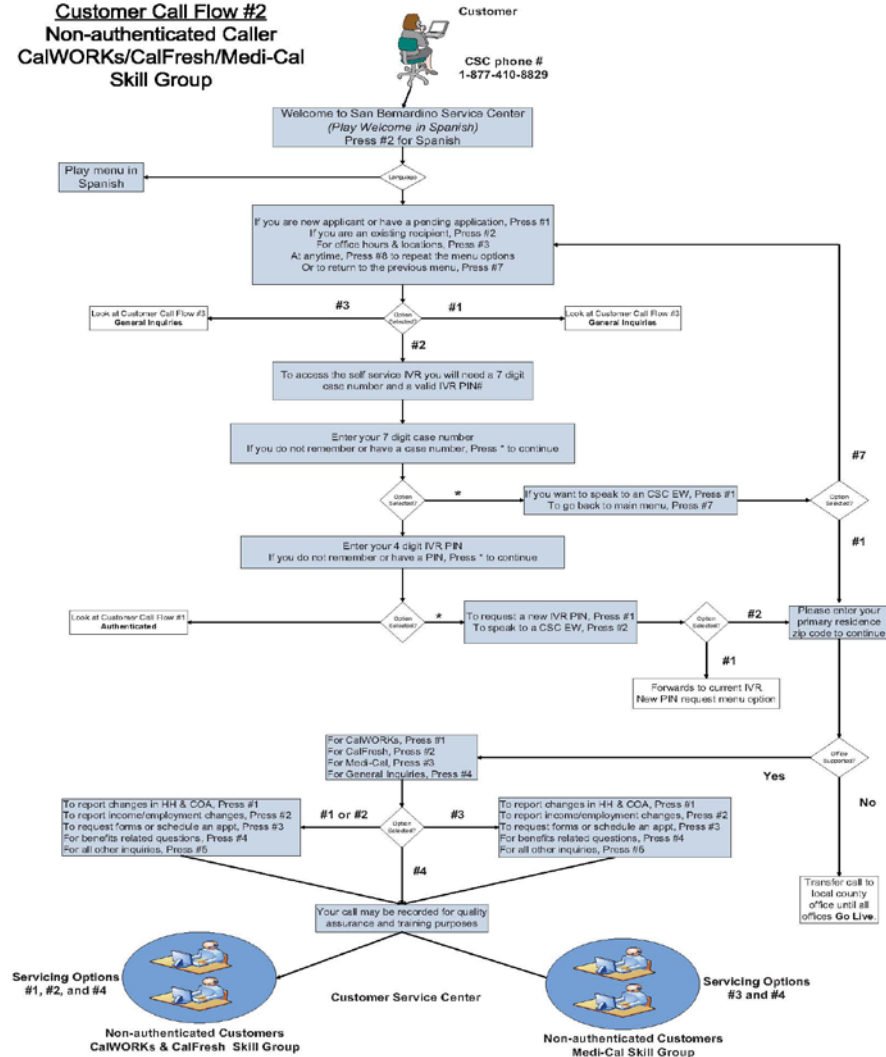
# Call Flow Examples

## Customer Call Flow #1 Authenticated Caller CalWORKs/CalFresh/Medi-Cal Skill Group

Office supported logic will check for worker and supported offices zip code in the following program order:  
• CalWORKs  
• Medi-Cal  
• CalFresh



## Customer Call Flow #2 Non-authenticated Caller CalWORKs/CalFresh/Medi-Cal Skill Group



# Wall Board Explanation

CT\_Service\_Levels\_Master\_NEW2

Call Type	Service Level Today	Calls Handled Today	Calls Abandoned Today	Calls At Agent Now
<a href="#">C36 EN CalFresh</a>	100.00 %	44	0	8
<a href="#">C36 EN CalWorks</a>	100.00 %	85	0	11
<a href="#">C36 EN General</a>	99.36 %	131	1	25
<a href="#">C36 EN MediCal</a>	100.00 %	46	0	11
<a href="#">C36 SP CalFresh</a>	100.00 %	9	0	4
<a href="#">C36 SP CalWorks</a>	83.33 %	5	0	1
<a href="#">C36 SP General</a>	100.00 %	24	0	3
<a href="#">C36 SP MediCal</a>	92.31 %	12	1	0
<b>Report Total:</b>	<b>99.29 %</b>	<b>356</b>	<b>2</b>	<b>63</b>

Service Levels are displayed in real time per call type and overall for the center.

Agent State Pie Chart by Agent

Calls Currently in progress

Wallboard SkillGroup Master NEW2

Skill Group	Router Calls Queued Now	Router Longest Call In Q	Available	Not Ready	Wrap	Talk Out	Talk In	Hold
<a href="#">CM_PG3_C36_EN_CalFresh</a>	0	00:00	2	13	4	0	5	0
<a href="#">CM_PG3_C36_EN_CalWorks</a>	0	00:00	2	10	6	0	5	0
<a href="#">CM_PG3_C36_EN_General</a>	0	00:00	3	17	9	0	12	0
<a href="#">CM_PG3_C36_EN_General_Super</a>	0	00:00	0	4	0	0	1	0
<a href="#">CM_PG3_C36_EN_MediCal</a>	0	00:00	1	6	6	0	5	0
<a href="#">CM_PG3_C36_SP_CalFresh</a>	0	00:00	0	3	1	0	2	1
<a href="#">CM_PG3_C36_SP_CalWorks</a>	1	01:26	0	1	0	0	0	0
<a href="#">CM_PG3_C36_SP_General</a>	0	00:00	3	6	2	0	2	0
<a href="#">CM_PG3_C36_SP_General_Super</a>	0	00:00	0	0	0	0	0	0
<a href="#">CM_PG3_C36_SP_MediCal</a>	0	00:00	3	4	0	0	0	0
<b>Report Total:</b>	<b>1</b>	<b>01:26</b>						

This is the availability status for each skill group. Each worker has multiple skill groups.

# Lessons Learned

- We are still learning...
- Communication is key
- Quick decisive leadership is necessary
- Start analyzing changes to evaluations/performance standards as soon as possible
- Must have hands on supervision
- Be patient and ready for surprises
- Use of Office Assistant staff
- Mail handling process
- Staff preparation, buy-in and performance

# Initial Outcomes of Service Efficiency Initiatives

- Transparency of work received/completed
  - ▣ Daily Conference Calls
- Reduced backlog
  - ▣ Goal for all work to be completed daily/weekly/monthly
- Enhanced customer ability to report changes and obtain information
  - ▣ Over 70,000 calls handled in January 2012
- Customers are receiving a more consistent message through the Customer Service Center
- Work completed earlier in the month
  - ▣ Majority of QR 7s, MSRs and REs completed by 3<sup>rd</sup> week



# Questions

