

# COUNTY SERVICE CENTER GROUP

## Technology Support in the Service Center

### CSCG MISSION STATEMENT:

The County Service Center Group is committed to maintaining a membership organization which promotes continuous learning and the exchange of information and ideas between California County Medi-Cal/Food Stamp Service Centers. We partner in an ongoing effort to improve work processes and deliver quality service in a professional, timely and efficient manner.

### CSCG Member Counties:

- Contra Costa
- Sacramento
- San Francisco
- San Mateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Orange
- Monterey
- Riverside

What do we do now?

Increase in cases, increase in calls, increase in tasks, increase in walk in traffic, increase in everything else...what, no increase in staff?

The good news is that we have a service center. We have been able to increase our capacity to handle more cases while also increasing customer access and customer service.

But, what do we do now? The caseloads continue to go up – what is the next silver bullet?

*Continue your efficient service center processes with technology to support, facilitate and, in some cases, even do some of the work for you.*

The following is a list of promising technology initiatives either in the works or on the drawing board:

1. Santa Clara IVR and imaging at the point of document entry
2. Sacramento and Tulare - appointment setting and lobby management
3. San Francisco and Riverside County Web based applications
4. State wide IVR - led by:
5. San Mateo County ; enhanced ACD, document management and future integration with a task tracking and work assignment tool

In this newsletter you will read about some of these initiatives and on February 19<sup>th</sup> you can participate in a web conference that will host the vendors who have implemented many of these applications. The web conference will address leveraging the technology you have in place, some of the results that justify implementing technology and an interactive discussion where you can ask questions and gain insights to how best to take advantage of these technologies.

Stay tuned for further details and web conference coordinates.

In the meantime, encouraging your staff, showing up everyday to fight the battle and looking for big and small ways to make the processes more efficient will continue to make a big difference in your clients lives.

In pursuit of the next silver bullet....

*Vail Dutto~CEO, InTelegy*

## InTelegy News

**InTelegy would like to introduce two new consultants: Harold Hernandez and Mark Carlos**  
*Harold Hernandez* originally joined InTelegy in 2003 and was instrumental in the design and implementation of the first Service Centers developed for San Mateo, Santa Clara and Contra Costa County. Harold returns to InTelegy following his work at eBay Inc. where he was the strategic leader of the complete redesign of their customer support infrastructure.

*Mark Carlos* brings 22+ years of technology and management consulting experience to InTelegy. Mark's experience includes work with F500 companies, small business clients, non-profits and government agencies. Welcome to Harold and Mark!

### Technology terms to know in county service centers

**ACD—Automated Call Distribution:** System that distributes incoming calls to a specific group customer service agents based on client input and business rules.

**IVR—Interactive Voice Response: Auto attendant menus:** In its simple form, this upfront menu is used to ascertain the reason for a call or language preference of the caller. This information is fed to the ACD for call distribution.

**TMT—Task Management Tool:** An acronym born out of an innovation at Sonoma County, this term is quickly becoming the standard to mean the tool by which service center tasks, or case work, is assigned to case workers.

**Transactional Document Scanning/ Point of Entry Scanning—** The process by which client documents are scanned wherever documents are received. Whether one piece of paper or an entire case file, the documents are scanned and accessible digitally quickly after receipt.

**CTI—** Computer telephony integration is technology that allows interactions on the telephone and computer to be integrated.

*InTelegy Corporation's goal is to provide information and ideas to our partner counties that allow them the opportunity to improve client and employee satisfaction. We do not have any business partnership or alliance with the technology providers included in this newsletter or any other client service technology provider, and thus remains neutral on the selection of technology tools.*

### California Service Center Counties advance their client support technology

Several of the CSCG member counties have technology initiatives underway that will change the way client service is provided in the future. These technologies are simple innovations that expand or improve the existing technologies in use.

**Santa Clara County's Social Services Agency** is in the last stages of development for a new Integrated Voice Response (IVR) solution. This tool, called Intelligent Routing, will provide access to county constituents looking for information on Child Abuse Reporting, Families and Children's programs (including cash aid, CalWORKs, Medi-Cal and Food Stamps), Adults, Elderly, or Persons with Disabilities Programs and Services, Agency Administration and general agency information. This tool is being built in SQL and will integrate with their current Mitel VOIP, Mitel ACD and network. This will allow the clients the ability to get case information and will also include a screen pop on the EW screens with the entered client information. The IVR will also do automated call reminders to clients to remind them of important dates or appointments.

**Sacramento County** advanced their client service technology in 2009 with the addition of Northwood's Compass Appointments™ in all of the Department of Human Assistance Bureau offices. This tool provides intake and lobby flow management where all client appointments are more streamlined through this appointment scheduling system that links the offices together, better manages case worker availability and ultimately decreases the time a client must wait in the bureau lobbies for assistance. The next phase of this implementation, planned for 2010, will be self check-in kiosks in the lobbies and lobby monitors allowing clients more information about their wait times and decreasing the wait time to check in for appointments.

**Tulare County's Health and Human Services** department is in the final stages of approval for the purchase and implementation of a similar solution of client service technologies. They plan to implement the client and employee scheduling tool, the self-check in kiosks and the lobby monitors to streamline the ever-increasing flow of clients in their HHSA offices. These technologies will be complemented with the inclusion of phone support for prospective clients, all with the goal of making it easier and less time consuming to obtain necessary benefits.

**San Mateo County's Human Services Agency** has been developing a document imaging solution that will change the way case documentation is managed in the office lobbies and the mail room. They started with the implementation of OnBase document imaging in 2009. The next phase planned includes distributed scanning and task assignment and tracking integrated with the document imaging system. With the addition of electronic forms, this suite of technology advancements will help the agency assign work more timely, process the documents more quickly and effectively, file them automatically, all benefiting the clients and employees with a vastly improved client service experience.

Both **San Francisco**, and our newest CSCG member, **Riverside County** have recently implemented web application tools to provide easier access for their clients. San Francisco County's much talked about [www.benefitsSF.org](http://www.benefitsSF.org) offers clients the opportunity to first determine if they are eligible and second apply for Food Stamps or Medi-Cal using their online form. Riverside, a CIV county, has implemented the use of [www.C4yourself.com](http://www.C4yourself.com) for online applications for Food Stamps and most recently Medi-Cal. Both online solutions offer clients one more way to gain access to these much needed benefits.

*Carole Dotson, Director of Consulting*

### In The News: Service Center Updates

**Santa Clara—**Santa Clara has now incorporated Food Stamps continuing cases into their newly named Benefits Service Center. This required a build out of their facility to accommodate the new staff, and a first wave of cross training of Medi-Cal workers in the Food Stamps program. This cross training will continue over the next several months.

**Riverside County—** Riverside completed their Strategy and Planning Phase and now is fully engaged in building their Service Center for Medi-Cal and Food Stamps Intake and Continuing functions. This is an exciting project because it includes Intake, it is a CIV County, and it will require implementation of the Service Center in multiple buildings. This is the first of the Service Center Hubs that Riverside will deploy to cover the entire County.

### UPCOMING CSCG NEWS:

**CSCG Quarterly Conference Call —** Mark your calendars for the next CSCG conference call, Wednesday, February 17th 11:00am. Topic: Service Center Technology-The Next Generation. Your invitation and conference call access information will arrive in your email inbox in early February. Contact [Margaret Condie](mailto:Margaret.Condie@inTelegy.com) if more information is needed.