

# California County Customer Service Centers

## Survey of Current Human Service Operations

*July 2012*

### **I. Introduction**

Early this spring, the County Welfare Directors Association of California (CWDA) worked with the California Department of Social Services to catalog how county human services are using the Interactive Voice Response (IVR) and Customer Service Centers to improve services to Medi-Cal, CalFresh, and CalWORKs customers. A supplementary survey was conducted in June 2012 in conjunction with the California Health Benefit Exchange to provide additional information. The responses to these surveys are summarized in the narrative below.

At the time of these surveys 21 counties operated customer service centers. All serve the on-going eligibility needs of Medi-Cal and CalFresh recipients. Twelve counties also conduct intake for Medi-Cal, CalFresh, and/or CalWORKs. Ten county centers also support CalWORKs on-going eligibility. Since February, Los Angeles expanded operations to a third center and one additional county implemented a center. Three more counties will open centers this calendar year.

Note that county customer service centers focus on phone support. While other intake and ongoing eligibility functions are also done for center staff during low call volume periods, the bulk of eligibility determination for mail-in and online applications is handled outside of customer service centers, by eligibility workers in every county. This functionality, which is conducted statewide and is already incorporated within counties' other eligibility operations, is not covered in this report.

### **II. Customer Service Center Background**

Counties began establishing service centers and Interactive Voice Response (IVR) systems nearly a decade ago, in response to a combination of years of reduced state funding for eligibility operations, sharply increased demand during the "great recession," and the need to shore up continuing eligibility work for existing customers while keeping the front door open for millions of new customers seeking services for the first time. The earliest service center was opened in 2003, in San Mateo County, with several more implementing in 2005, and today there are 21 counties with service centers and three more that plan to come online in 2012. Together, these service centers will cover more than 85% of the statewide caseload by year's end.

At the height of the recession, counties were receiving about 400,000 applications per month across the three major programs we operate on the state's behalf – Medi-Cal, CalFresh and CalWORKs. This unprecedented level of demand was occurring at the same time that county eligibility operations had received years of cuts due to California's

budget deficits. As counties shifted staff toward the intake operations to keep up with increased demand, they searched for ways to continue providing a level of customer service to their existing caseloads. The service center model grew from this need, and initially focused on continuing eligibility work for existing cases, processing changes such as address moves, income changes and adding household members to cases. Over time, counties have begun adding intake processes as well. Though current program rules make it difficult to complete applications over the phone, applications can be started by phone and finished by mail, online or in person.

Counties developed their service centers individually, without dedicated resources from the state or a statewide set of policies or guidelines. Without a statewide strategy in place, counties developed their own “home grown” solutions and shared promising practices with one another, leading to many commonalities and some differences across the service centers in place today, as each county assessed its individual circumstances and needs within available resources.

The surveys conducted of counties with active service centers focused on current capacity, not the potential for future growth. All counties use technology that can be built upon to add additional programs and services, as well as expand for use by additional county eligibility workers as needed in the future.

### **III. County Customer Service Centers**

#### **A. Current Customer Service Centers**

The following counties have implemented customer service centers over the last nine years. Most have located this function in one office, while others have multiple locations.

Alameda	Riverside	Santa Clara
Contra Costa	Sacramento	Santa Cruz
Fresno	San Bernardino	Solano
Kern	San Diego	Sonoma
Los Angeles	San Francisco	Stanislaus
Orange	San Mateo	Tulare
Placer	Santa Barbara	Ventura

#### **B. Planned Customer Service Centers**

Three more counties will be opening customer service centers this calendar year: Humboldt, Shasta and Yolo.

At the time of the survey, 10 additional counties were exploring opening a center. Since that time, the remaining counties have engaged in a planning effort to ensure that all counties will be served by a service center, for future statewide coverage.

**IV. Current Functionality**

**A. Interactive Voice Response Systems (IVR)**

Many industries rely on IVR systems to answer questions for customers and allow customers to access their account information at any hour of the day. Similarly, all large and most medium sized counties use IVR systems to provide answers to the most frequently asked questions 24 hours a day, every day of the year. This includes both general information and case specific information, such as:

General Information & Assistance	Office hours and location Request forms Leave a message
Case Specific Information	Change phone number Address verification Benefit issuance date Medi-Cal Share of Cost information Cash aid benefit amount CalFresh benefit amount Case status Case worker contact information Sanction information Quarterly report due date & receipt status Annual redetermination due date

The table below displays the total number of calls received during February 2012 in the counties that have customer service centers, noting the most frequent requests:

Total IVR Calls	General Information	Caller Requested Grant Amount	Caller Requested Date of Last Grant
878,478	43,478	288,076	73,336

**B. Hours of Operation**

All counties offer customers the option to speak with a representative during core business hours. Some begin service as early as 7:00 a.m. and others go as late as 5:30 p.m. on week days. Counties have experimented with longer hours and weekend availability to address customer needs during particularly busy times. For new program rollout, an extended schedule could be implemented either temporarily or on an ongoing basis. The following table displays the hours county customer service centers provided access to representatives as of February 2012.

County	Hours of Operation
Orange	7:00 – 5:00
Los Angeles, San Bernardino	7:30 – 5:30
Fresno	7:30 – 5:00
Riverside	8:00 – 5:30
Santa Clara	8:00 – 4:00
Alameda	8:30 – 5:00
Stanislaus	8:30 – 4:30
All Others	8:00 – 5:00

**C. Programs & Functions Supported**

All of the 21 county customer service centers provide ongoing eligibility support for Medi-Cal and CalFresh customers. Most counties also provide support to existing customers in other programs. Many are adding intake to the services they offer, although this is challenging under today’s program rules where extensive paper documentation is needed to support applicant statements, in addition to signatures and in-person interview requirements that vary across programs. Implementation of health reform simplifications will allow much more intake work to be accomplished via phone. The following chart outlines the current services provided.

Program	Intake	Ongoing Eligibility Support
Medi-Cal	11	21
CMSP or Local Indigent Health	2	4
CalFresh	11	21
CalWORKs	5	10
General Assistance/General Relief	2	5
IHSS	N/A	2

**D. Calls Received**

County customer service centers received more than 716,000 calls in February 2012, and the monthly number of calls continues to increase. Most calls are received at the beginning of the month, the beginning of the week, during mid-day (11:00 a.m. through 2:00 p.m.), and following a holiday.

**E. Length of Calls**

Counties find that the length of call varies by services, program and language spoken by the customer. Generally, calls from current customers are the shortest while individuals applying for benefits are the most lengthy. The following table shows a range of average call time in a typical month during the last year for a sample of counties with a range of services offered.

<b>County</b>	<b>Average Length of Call (Minutes:Seconds)</b>
Fresno	5:00
Kern	4:39
Los Angeles	9:18
Orange	4:56
Placer	4:14
Sacramento	4:40
San Bernardino	4:39
Santa Barbara	5:05
Stanislaus	5:00
Tulare	4:31
Ventura	6:18

**F. Language Support**

Counties support as many as 14 languages, depending on the needs of their community. These include English, Spanish, Armenian, Russian, Korean, Cambodian, Chinese – Mandarin, Chinese – Cantonese, Vietnamese, Tagalog, Hmong, Lao, Farsi, and Bosnian. The most frequently spoken languages are supported by county staff, with outside services (such as the AT&T Language Line) used as needed for less commonly spoken languages.

## G. Additional Services

Counties are continually advancing their services. Most counties use an industry best practice “warm hand off” to transfer a caller. This is currently used most frequently to connect a caller with a supervisor. Three counties have recently added a “click to chat” service to assist customers who are online completing an application or checking information in their case online, and have questions they would like to ask a customer service representative. Several counties are working on other enhancements, such as providing the estimated wait time and offering an option to send an email to the customer if wait time is longer than they would like to hold.

## H. Staffing

Counties are able to draw from tens of thousands of highly trained eligibility workers to staff their customer service centers. The current county service centers employ nearly 2,000 full time equivalent eligibility workers, supported by clerical, supervisorial, and management employees. Survey results in February showed a staffing level of 1,684. Since that time Los Angeles opened a third site with an initial staffing level of 125, Stanislaus added staff and functions, and San Diego increased its staffing as well. The following table shows staffing in the largest counties’ customer service centers.

County	Eligibility Workers
Los Angeles*	350
Santa Clara	300
Sacramento	270
Contra Costa	147
San Bernardino	143
Orange	114
San Diego*	95

\* Updated to reflect additional staff added in June 2012

## I. Performance

All county centers use data to measure performance. Measures and definitions vary. Examples include: average wait time, longest wait, call abandonment rate, and how often callers receive a busy signal. These measures vary across counties due to a number of factors including how IVR is deployed, individual county funding levels, programs included, and the services offered. The following are the most common current measurements from a sample of counties:

County	Call Abandonment Rate	Average Wait Time Minutes:Seconds
Fresno	8.0%	0:54
Kern	0.9%	1:31
Los Angeles	17.9%	6:57
Orange	13.8%	5:15
Placer	2.0%	0:43
Sacramento	5.9%	1:50
San Bernardino	10.0%	2:49
Santa Barbara	6.0%	1:23
Stanislaus	6.0%	1:00
Tulare	4.6%	0:35
Ventura	6.5%	2:11

Kern, San Mateo, and Santa Clara counties currently offer callers the opportunity to complete an automated customer service evaluation at the conclusion of their call. Placer County will be adding this feature this calendar year. Four other counties (Los Angeles, Sacramento, Santa Cruz, and Sonoma) periodically survey client satisfaction.

These performance levels reflect current operations in an environment with no direct dedicated funding from the state, complex program rules and no statewide service center standards. Given the growth in service center usage over time, counties are currently working with our state partners to develop standard definitions, performance targets, and formal mechanisms for advancing best practices across counties.

Counties also use customer service center software to measure other critical management indicators, such as average length of call, average “wrap time”, types of calls, and time of calls (during day, week and month).

## **V. Current and Future Capacity**

### **A. Staffing**

Counties currently dedicate more than 2,000 staff to support the 21 operational customer service centers. These staff are drawn from a pool of over 15,000 Medi-Cal eligibility workers and 10,000 CalFresh and CalWORKs staff. This workforce can be readily expanded with new, permanent staff as well as temporary staff drawn from the ranks of recently retired workers. Customer service center staffing specifically for health care coverage programs can be augmented with overtime, remote workers and staff from other programs as needed.

The software, hardware and telephony systems deployed in these counties can be readily expanded to respond effectively to callers seeking assistance with health care coverage under the Affordable Care Act. In addition, many counties already are planning to add workers to their service center capacity, and counties can further increase available space by repurposing existing facilities and procuring additional space. A number of counties (including Los Angeles and San Francisco) are piloting the use of remote workers. This model can be expanded to additional counties in advance of health care reform implementation if needed.

County hiring, orientation and training systems are in place, which can be used to augment staff to the degree needed to meet additional workload demands.

### **B. Hours of Operation**

Counties can expand the hours their customer service centers can receive calls to meet needs under health care reform, either temporarily or on an ongoing basis depending on projected vs. actual demand.

### **C. Performance Measurement**

Currently used customer service center software can track and report performance using standardized measures as developed by the Exchange and the Administration.

### **D. Expanded Functionality**

Counties can universally add software features and adopt business practices to meet customer needs – expanding on what is already in place. Examples include additional warm hand-offs to other customer service divisions as needed, implementing click to chat support of online users, and additional automated customer service surveys.

## **VI. Credits**

This document was prepared by the County Welfare Directors Association of California based on data compiled in cooperation with the California Health Benefit Exchange.