

# San Bernardino County Transitional Assistance Department Customer Service Center Health Care Reform and Work Force Management



# Health Reform Quick Facts

- Added 44 full time EWs to answer Covered CA Quick Sort Transfers in three locations
  - Experienced Eligibility Workers
  - Will work alongside regular CSC staff
- 22 specific staff pre-designated as HCR back-up agents
  - Will be moved into the queue as call volume warrants
- Added 10 Work@Home staff for evenings and Saturday coverage (in process)
- Added a 4/10 work schedule to 5/40 and 9/80 options
- OT offered for Saturdays during Open Enrollment

# Why is Work Force Management Important?

- Service Level, Service Level, Service Level
- Managing Resources
  - Scheduling
  - Predicting events
- Understand trends



# CSC Work Force Management

- Workforce Management (WFM) encompasses all of the activities needed to maintain a productive workforce.
- Specifically, Workforce Management includes:
  - Forecasting
  - Scheduling
  - Reporting
  - Intraday/Change Management
  - Real-Time Decision Making
- Staff Analyst I position in San Bernardino





# CSC Work Force Management

## WFM Tools – IEX TotalView

### Intraday – Forecast Data Screen

Intraday - 3601: C36 All CTs (non sup) | Schedule Management - 36: C36 SB County

CT Set: 3601 C36 All CTs (non sup) | Date: 7/11/12

All Contact Types | Data: Revised | Compare: Intraday

**Side by side comparison of forecasted service level vs actual**

| Time           | Contacts     |                 |                |                  | Service level |        | AHT      |        | ASA    | Requirements |        | Scheduled open |        | Estimated staff |                  | Occupancy |
|----------------|--------------|-----------------|----------------|------------------|---------------|--------|----------|--------|--------|--------------|--------|----------------|--------|-----------------|------------------|-----------|
|                | Rev received | Actual received | Handled actual | Abandoned actual | Rev           | Actual | Rev      | Actual | Actual | Rev          | Actual | Open           | Open   | Staff           | Staff - Intraday | Actual    |
| 7:00 AM        | 0            | 0               | 0              | 0                | 0.00          |        | 0.00     | 0.00   |        | 0.00         | 0.00   | 0.00           | 0.00   | 0.25            | 0.25             | 0.00      |
| 7:30 AM        | 63           | 57              | 57             | 0                | 99.39         | 100.00 | 455.28   | 516.49 | 3.32   | 24.41        | 24.47  | 67.03          | 67.03  | 58.79           | 40.52            | 27.81     |
| 8:00 AM        | 141          | 129             | 128            | 1                | 99.43         | 99.22  | 495.30   | 492.97 | 2.81   | 50.41        | 46.00  | 115.95         | 103.59 | 103.59          | 61.54            | 33.85     |
| 8:30 AM        | 207          | 185             | 185            | 0                | 97.74         | 100.54 | 556.30   | 637.57 | 2.34   | 77.34        | 79.33  | 121.29         | 114.89 | 114.89          | 48.24            | 57.03     |
| 9:00 AM        | 230          | 241             | 241            | 0                | 95.02         | 100.00 | 582.38   | 597.71 | 1.91   | 89.04        | 94.56  | 111.91         | 109.72 | 109.72          | 31.86            | 72.95     |
| 9:30 AM        | 235          | 254             | 254            | 0                | 68.77         | 91.73  | 580.18   | 559.98 | 9.08   | 90.45        | 93.20  | 87.89          | 85.80  | 85.80           | 4.55             | 92.86     |
| 10:00 AM       | 257          | 244             | 242            | 2                | 84.38         | 97.93  | 577.00   | 580.62 | 4.08   | 97.29        | 92.82  | 101.84         | 91.24  | 91.24           | 3.36             | 85.55     |
| 10:30 AM       | 288          | 246             | 246            | 0                | 90.86         | 98.78  | 565.58   | 594.13 | 2.39   | 105.40       | 96.89  | 116.72         | 108.33 | 108.33          | 13.12            | 74.95     |
| 11:00 AM       | 281          | 317             | 317            | 0                | 91.04         | 98.42  | 576.76   | 574.04 | 3.16   | 105.60       | 115.90 | 121.01         | 113.38 | 113.38          | 20.07            | 89.16     |
| 11:30 AM       | 250          | 234             | 233            | 1                | 80.48         | 94.85  | 608.18   | 633.08 | 6.90   | 99.52        | 97.11  | 101.35         | 88.36  | 88.36           | -0.11            | 92.77     |
| 12:00 PM       | 234          | 233             | 229            | 4                | 79.19         | 91.70  | 600.68   | 574.95 | 9.67   | 92.32        | 87.27  | 93.36          | 83.89  | 83.89           | 2.13             | 87.20     |
| 12:30 PM       | 247          | 210             | 210            | 0                | 84.47         | 98.57  | 555.22   | 596.76 | 4.58   | 90.75        | 84.43  | 95.66          | 80.11  | 80.11           | 0.44             | 86.91     |
| 1:00 PM        | 262          | 242             | 241            | 1                | 83.31         | 91.70  | 561.06   | 587.25 | 8.52   | 96.39        | 92.40  | 99.73          | 88.05  | 88.05           | 3.52             | 89.29     |
| 1:30 PM        | 252          | 222             | 222            | 0                | 92.75         | 100.00 | 586.21   | 610.51 | 2.14   | 97.03        | 90.18  | 112.95         | 96.71  | 96.71           | 12.01            | 77.86     |
| 2:00 PM        | 236          | 217             | 217            | 0                | 84.39         | 99.08  | 608.05   | 615.87 | 2.56   | 94.58        | 88.71  | 99.89          | 94.19  | 94.19           | 12.18            | 78.84     |
| 2:30 PM        | 234          |                 |                |                  | 44.49         |        | 566.09   |        |        | 87.91        | 0.00   | 77.51          | 0.00   | 0.00            | 0.00             |           |
| 3:00 PM        | 242          |                 |                |                  | 50.93         |        | 562.73   |        |        | 90.22        | 0.00   | 82.68          | 0.00   | 0.00            | 0.00             |           |
| 3:30 PM        | 221          |                 |                |                  | 92.82         |        | 578.07   |        |        | 84.46        | 0.00   | 100.18         | 0.00   | 0.00            | 0.00             |           |
| 4:00 PM        | 185          |                 |                |                  | 94.34         |        | 606.50   |        |        | 76.58        | 0.00   | 92.71          | 0.00   | 0.00            | 0.00             |           |
| 4:30 PM        | 114          |                 |                |                  | 98.47         |        | 696.75   |        |        | 57.39        | 0.00   | 86.28          | 0.00   | 0.00            | 0.00             |           |
| 5:00 PM        | 48           |                 |                |                  | 97.82         |        | 726.09   |        |        | 29.90        | 0.00   | 46.42          | 0.00   | 0.00            | 0.00             |           |
| 5:30 PM        | 7            |                 |                |                  | 30.64         |        | 1,312.39 |        |        | 13.89        | 0.00   | 6.51           | 0.00   | 0.00            | 0.00             |           |
| <b>Total</b>   | 4,233.76     | 3,031           | 3,022          | 9                |               |        |          |        |        | 825.44       | 591.64 | 969.44         | 658.65 | 658.65          | 126.95           |           |
| <b>Average</b> | 192.44       | 202             | 201            | 1                | 83.47         | 97.01  | 580.37   | 589.21 | 4.70   | 75.04        | 78.88  | 88.13          | 87.82  | 87.82           | 16.93            | 75.15     |

**# of calls forecasted for the day**

This screen displays forecasted service levels, and tracks multiple call volume and scheduling statistics throughout the day, enabling WFM to proactively respond to changing CSC conditions.

# CSC Work Force Management

## WFM Tools – IEX TotalView

### Agent WebStation

The screenshot displays the IEX TotalView Agent WebStation interface. The main content area is titled "Today is Wednesday, August 17, 2011". It features several sections:

- Home**: A navigation menu on the left with icons for Home, ScheduleViewer, StatsViewer, Time Off Manager, and Performance Manager.
- Alerts**: A red starburst icon in the top left corner.
- My schedule for today:** A list of activities with times and arrows. A callout box labeled "Today Schedule" points to this section.
- My schedule for this week:** A table showing the schedule for the current week. A callout box labeled "Weekly Schedule" points to this section.
- My schedule for next week:** A table showing the schedule for the following week. A callout box labeled "Next Week Schedule" points to this section.
- My current statistics for today:** A table showing performance metrics. A callout box labeled "Stats for today" points to this section.
- Schedule Change Pop Up:** A small window titled "Schedule Change" with the IEX logo and the message "Your schedule has changed!". A callout box labeled "Alert Pop Up" points to this window.

|          |                     |   |
|----------|---------------------|---|
| Open     | 08:15 AM - 10:15 AM | ▲ |
| Break    | 10:15 AM - 10:35 AM | ▲ |
| Open     | 10:35 AM - 01:15 PM | ▲ |
| Lunch    | 01:15 PM - 01:45 PM | ▲ |
| Open     | 01:45 PM - 02:00 PM | ▲ |
| Casework | 02:00 PM - 03:15 PM | ▲ |
| Break    | 03:15 PM - 03:35 PM | ▲ |
| Casework | 03:35 PM - 05:45 PM | ▲ |

| Sun     | Mon                  | Tue                  | Wed                  | Thu                  | Fri     | Sat     |
|---------|----------------------|----------------------|----------------------|----------------------|---------|---------|
| 8/14/11 | 8/15/11              | 8/16/11              | 8/17/11              | 8/18/11              | 8/19/11 | 8/20/11 |
| OFF     | 08:15 AM<br>05:45 PM | 08:15 AM<br>05:45 PM | 08:15 AM<br>05:45 PM | 08:15 AM<br>05:45 PM | OFF     | OFF     |

| Sun     | Mon                  | Tue                  | Wed                  | Thu                  | Fri                  | Sat     |
|---------|----------------------|----------------------|----------------------|----------------------|----------------------|---------|
| 8/21/11 | 8/22/11              | 8/23/11              | 8/24/11              | 8/25/11              | 8/26/11              | 8/27/11 |
| OFF     | 08:15 AM<br>05:45 PM | 08:15 AM<br>05:45 PM | 08:15 AM<br>05:45 PM | 08:15 AM<br>05:45 PM | 09:15 AM<br>05:45 PM | OFF     |

| Inbound contacts | ATT      | AWT      | AHT      | Outbound contacts |
|------------------|----------|----------|----------|-------------------|
| 3                | 00:01:44 | 00:00:36 | 00:02:20 | 0                 |

This screen gives CSC Agents multiple views of their schedules and statistics.

# Individual Staff Management

## Monthly Narrative Document

|    | A                             | B   | C                 | D            | E                   | F                       | G                          | H                                 | I   | J                      | K |
|----|-------------------------------|---|-------------------|--------------|---------------------|-------------------------|----------------------------|-----------------------------------|---|------------------------|---|
| 1  | <b>Christie W - June 2013</b> |   |                   |              |                     |                         |                            |                                   |   |                        |   |
| 2  | EW NAME                       | AVERAGE HANDLE TIME   | AVERAGE WRAP TIME | ADHERENCE    | TOTAL CALLS HANDLED | TOTAL # OF CASE REVIEWS | TOTAL # OF CORRECT Reviews | TOTAL # OF NICE CUST SERV REVIEWS | TOTAL # OF CORRECT NICE CUST SERV REVIEWS | SICK LEAVE USAGE HOURS |   |
| 3  | Diaz, S                       | 14:08   | 7:10              | 76.23        | 180                 | 0                       | 0                          | 0                                 | 0   | 0.00                   |   |
| 4  | Hollar-Walker, E              | 15:04   | 10:40             | 75.92        | 226                 | 5                       | 4                          | 5                                 | 4   |                        |   |
| 5  | Jackson, A                    | 11:22   | 6:00              | 90.71        | 647                 | 10                      | 9                          | 7                                 | 6   |                        |   |
| 6  | Jefferson, W                  | 14:07   | 8:16              | 96.13        | 485                 | 8                       | 7                          | 5                                 | 4   |                        |   |
| 7  | Lopez, C                      | 8:24  | 3:49              | 80.51        | 538                 | 10                      | 9                          | 7                                 | 6   |                        |   |
| 8  | Miranda, T                    | 11:33   | 7:43              | 90.73        | 75                  | 0                       | 0                          | 0                                 | 0   | 133.00                 |   |
| 9  | Moreno, D                     | 14:19   | 9:03              | 83.35        | 407                 | 13                      | 11                         | 10                                | 8   | 9.00                   |   |
| 10 | Rougeau, M                    | 9:57  | 4:39              | 83.82        | 550                 | 10                      | 5                          | 7                                 | 2   |                        |   |
| 11 | Tyra, C                       | 7:29  | 3:49              | 84.20        | 626                 | 4                       | 4                          | 2                                 | 2   |                        |   |
| 12 | Velazquez, M                  |   |                   |              |                     |                         |                            |                                   |   | EL                     |   |
| 13 |                               |   |                   |              |                     |                         |                            |                                   |   |                        |   |
| 14 | <b>Total/Avg per unit</b>     | <b>11:49</b>  | <b>6:47</b>       | <b>84.62</b> | <b>415</b>          | <b>60</b>               | <b>49</b>                  | <b>43</b>                         | <b>32</b>                                 | <b>142</b>             |   |
| 15 | <b>Office Wide Average</b>    | <b>11:28</b>  | <b>6:46</b>       |              |                     | <b>81.67%</b>           | <b>Unit Proficiency</b>    |                                   |   |                        |   |
| 16 | <b>NAME</b>                   | <b>NOTES/COMMENTS:</b> Please include any/all additional information specific to each worker. For example, discussions, memos, etc. Regarding any of the above data that is out of compliance or outside the average. |                   |              |                     |                         |                            |                                   |   |                        |   |
| 17 | S Diaz                        | No reviews - First day was 6-17 at CSC  |                   |              |                     |                         |                            |                                   |   |                        |   |



# Individual Staff Management

- Review monthly data with staff
- Track trends
- Compare staff data to office wide data
- Monitor Adherence (90% standard in San Bernardino)
- Case Reviews 10 total per employee (EDBC Report)
  - Program Integrity - 2
  - Supervisor - 5
  - EW III/Lead Worker - 3

# Customer Service Goals

- Meet Service Level
- Staff must be available to answer the phone
  - *Perfect Attendance Certificates*
- Must provide READY Customer Service
  - Responsive
  - Efficient
  - Accurate
  - Dedicated
  - You Make the Difference
  - *Call of the Month Awards*
- Track One and Done efforts
  - *Multiple call reports*
    - Look at cases where the customer called multiple times by district office.
    - Review criteria - could it have been avoided, lessons learned, corrective action.

# Questions?



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