

# Washington's Call Centers

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A briefing about how call centers are structured for Washington's public assistance offices.

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Washington is currently taking public assistance call centers into its next generation operational model that will be fully operational by October, 2009. This document provides a brief background and description of call centers.

## Background

Washington’s Community Services Division (CSD) operates a network of 43 community service offices (CSOs) and 14 branch offices throughout the State (see Attachment “ESA Office Map 0108.pdf”). CSD operations are managed through six regions with a core group of program and operations support staff located in Olympia. CSOs provide services to “catchment” areas based on zip codes.

CSOs offer cash assistance, basic food, medical, child care assistance, social services, and emergency assistance to vulnerable adults and children in Washington. Services are offered via local community offices, outreach locations (hospitals, food banks), and call centers.

<b>PROGRAM</b>	<b>Active Assistance Units as of 12-31-08</b>
TANF	55,588
Basic Food	322,443
General Assistance	32,780
Child Care	36,011
Medical Assistance (Medical Only cases = 69% of total)	549,865
<b>2008 Statistics</b>	
2008 Call Volume	3,261,000
2008 Document Volume Total	7,869,000
<b>Staffing</b>	
Total Division Staff (FTEs) <sup>1</sup>	2900±
Call center staff = approx. 24%; storefront =70%	

With the downturn in the state and local economy, more households in Washington are facing economic hardships and turning to the Department for assistance. Added to the current economic conditions, program expansions such as increased income limits for Basic Food under categorical eligibility, have resulted in significant increases to the volume of applications, call traffic, and work documents.

CSD is currently re-engineering its processes and organizational structure to meet the increased demand for services coupled with fewer resources. CSD will leverage streamlined processes and technology to meet this need.

<sup>1</sup> Full-Time Equivalent. 1 FTE = 174 hours per month

## 2000, The Beginning for Call Centers...

CSD implemented call centers in its CSOs in 2000. In 2002, a “New CSD” plan was adopted that outlined a service delivery model to streamline service and business operations. The concept concentrated on enhancements to three areas: CSO operations, call centers, and processes. Not all aspects of the New CSD plan were completed and some were not adopted following changes in leadership. With statewide standardized planning de-emphasized, localized planning produced varied results. Variations developed in call center scope of services, implementation of program policies and procedures, and service delivery models.

## 2008, Fine Tuning Needed...

In January, 2008, a comprehensive review of CSD call center operations was published (reference attached report entitled “CallCenterReport13-111407.pdf.” The report concentrated on:

1. Call Center operations (scope of services, operational models, best practices, training, quality and performance, and policies and procedures).
2. Supportive Technology (business applications, equipment and network, call flow configurations, call monitoring, disaster recovery, and emerging technology).
3. Cost Analysis.

The report identified 43 different operational models for call centers and inconsistent procedures. Forty-one recommendations focus on statewide consistency. CSD is currently in the process of implementing those recommendations.

In conjunction with the Call Center recommendations, the Division began a Service Delivery Review (SDR) project for all CSD operations. The focus of this review is to re-engineer the Division’s service delivery model to streamline processes for all customer access points.

## 2009, Streamlined Call Centers & Operations...

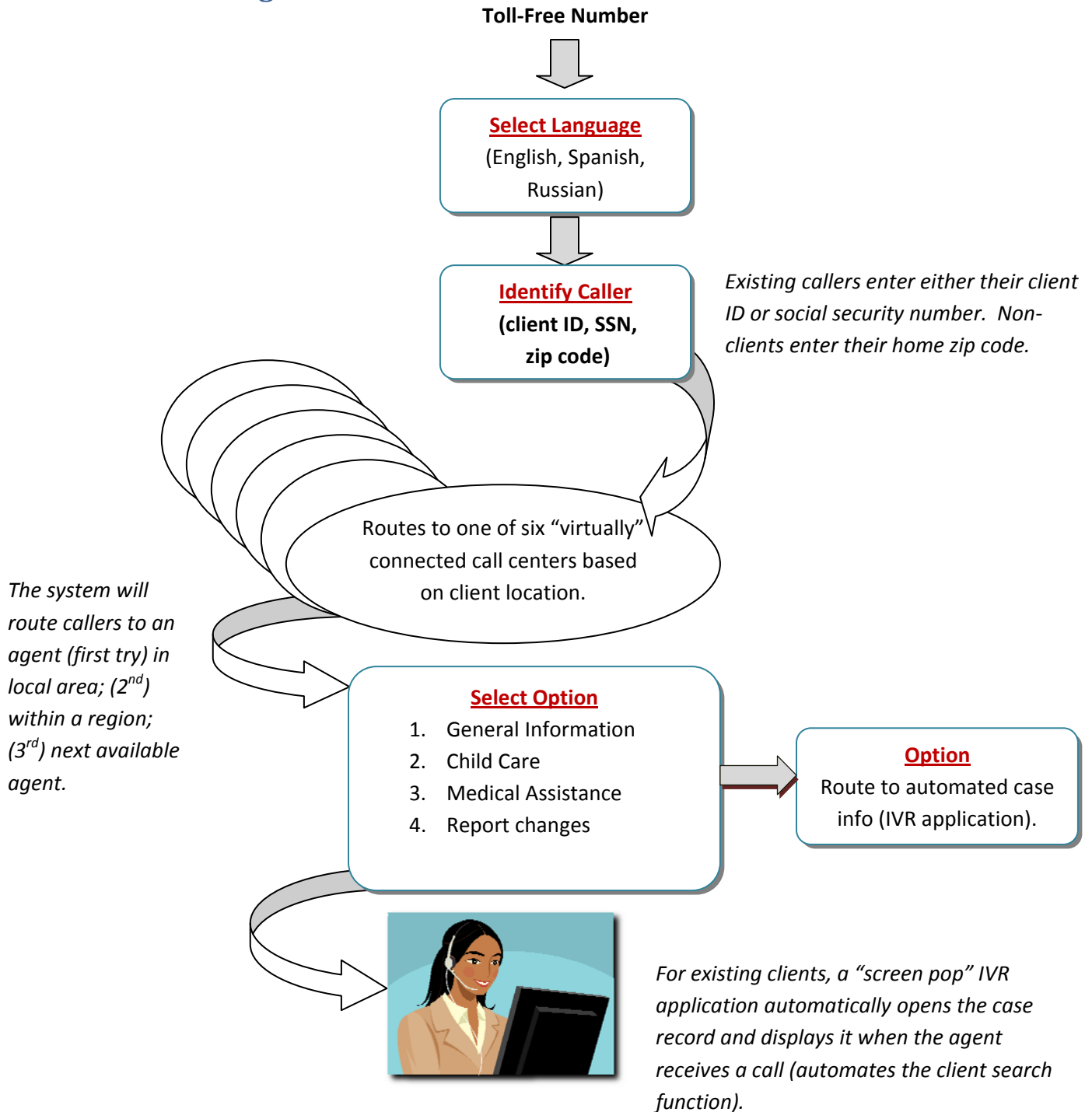
By October 2009, CSD will implement a new operational model with a standard scope of service:

Operational Model: A virtual statewide call center with one toll-free number for clients. Call centers will be physically organized into six regional call centers that will be virtually connected via our existing voice and WAN network.

Standard Scope of Services: CSD call centers provide:

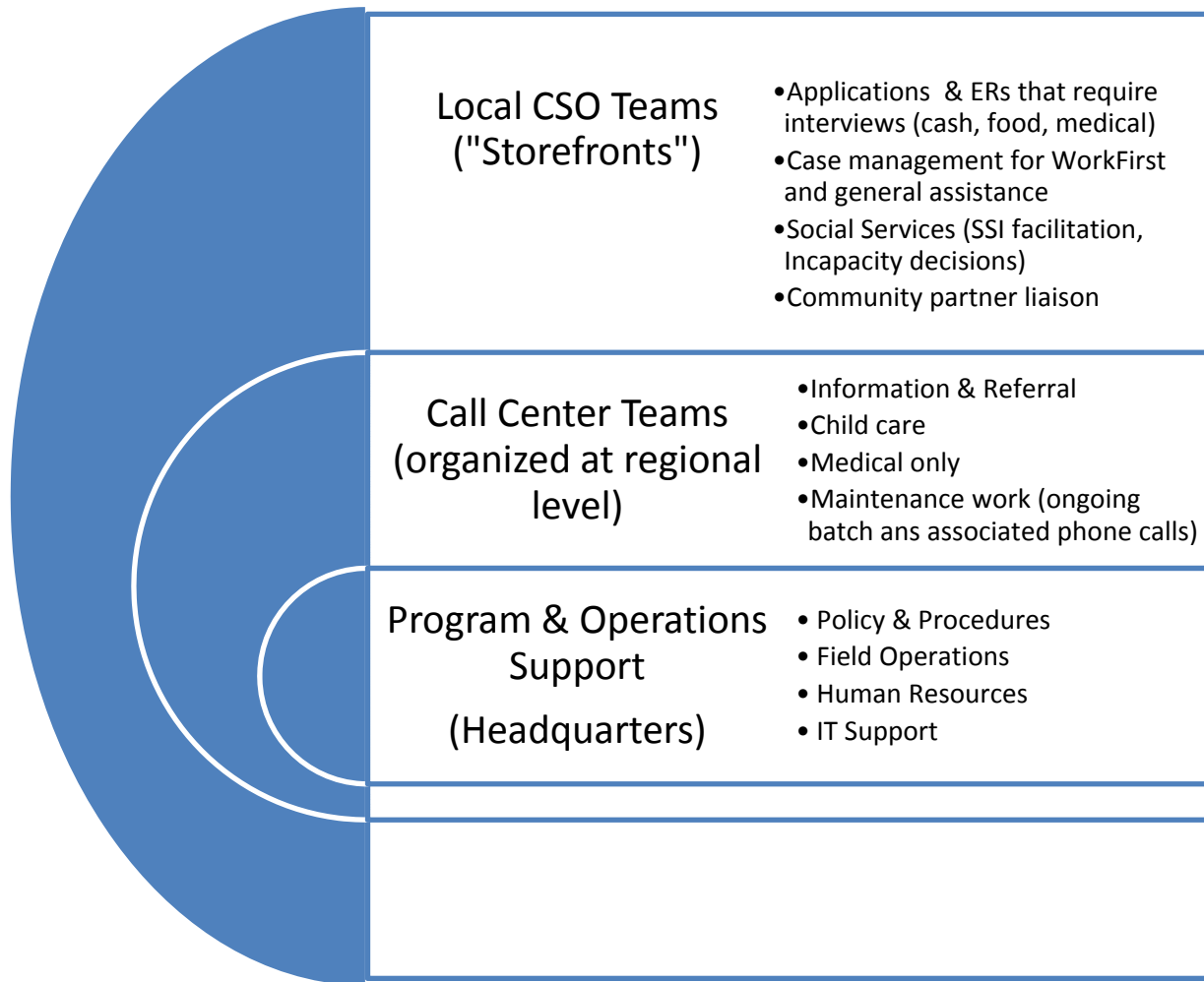
- Information & Referral
- Child Care (calls and paperwork)
- Medical-only (calls and paperwork)
- Maintenance (calls and paperwork for all programs)

## Call Flow Configuration



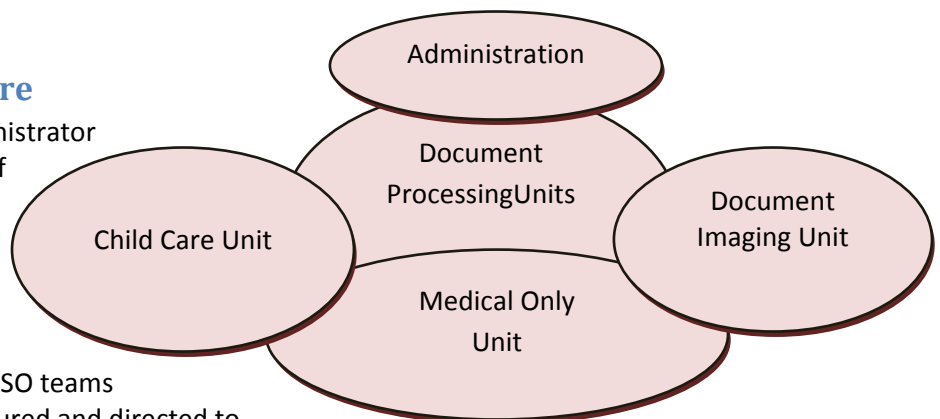
There are separate toll-free numbers for medical and child care providers to use that a “dedicated” pool of agents answer. Separate numbers are also used for specialized programs (telephone assistance, customer relations, SSI recipient food).

## CSD Organizational Structure.



### New Call Center Unit Structure

Call centers have one statewide administrator with local supervisors. Call center staff (financial staff) can be moved between units as workload fluctuates. Work can be shared statewide.

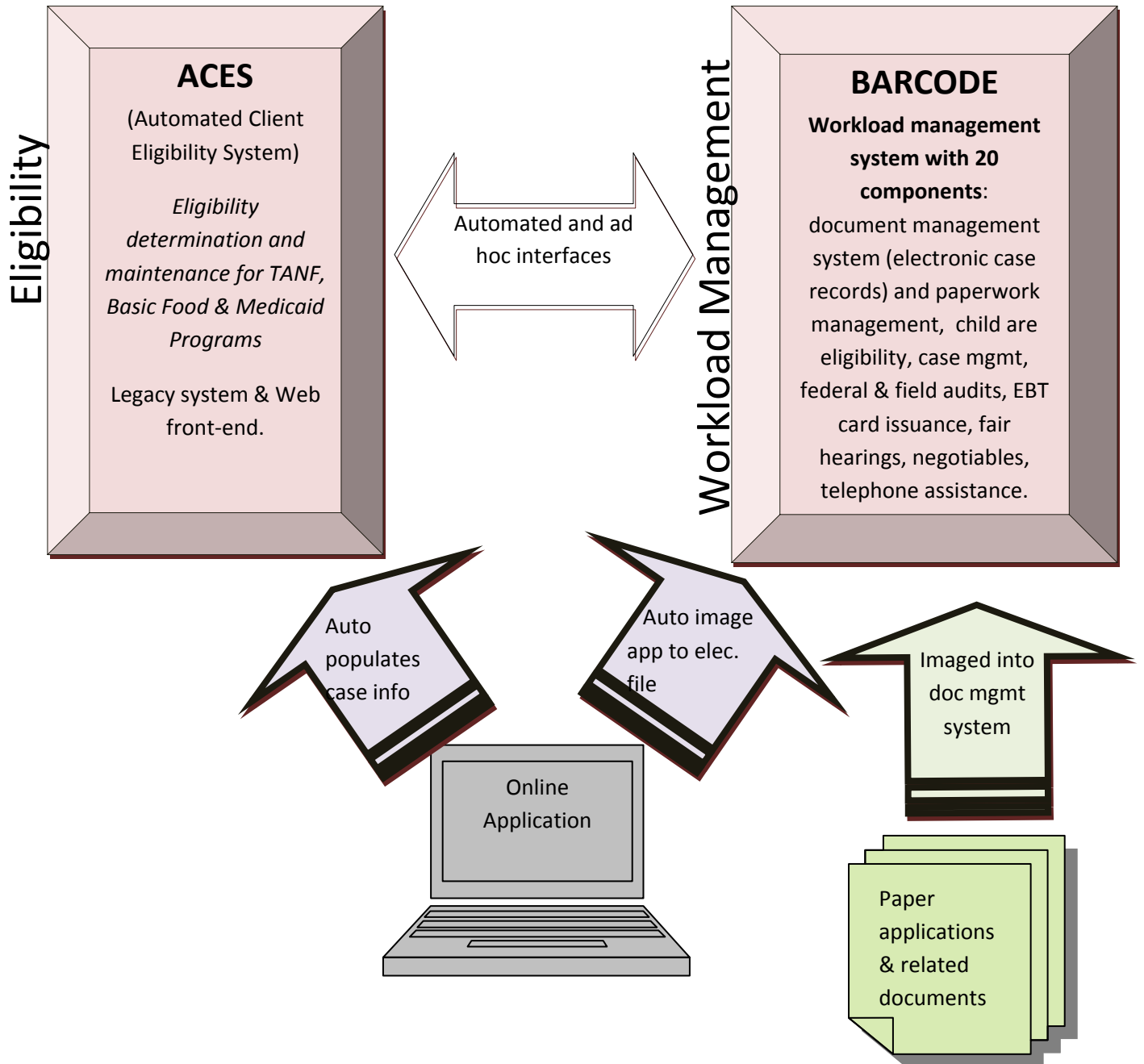


Communication protocols with local CSO teams ensure case activity requests are captured and directed to correct staff. E.G., a WorkFirst specialist in the CSO is notified of a TANF change of circumstance using an automated "tickler."

The document imaging units and document processing units support both local offices and call centers.

## Business Applications

CSD uses several business applications to determine eligibility and manage workload. ACES is an eligibility determination and maintenance system for TANF, Basic Food & Medicaid Programs. Barcode is a server-based system, and provides workload management functions and contains several sub-systems (child care, social services, EBT tracking, document management).



## Call Center Technical Configuration

The telecommunications equipment and software used to support CSD Call Centers consists of:

- **Public Branch Exchanges (PBXs)**—owned and operated by our Department of Information Services (DIS) and includes both AVAYA and NORTEL switches. There are five regional PBXs that serve multiple state departments located in Olympia, Tacoma, Seattle, Everett and Spokane. Individual telephone sets that are connected to the PBXs are owned by CSD.

PBX switches provide multiple telephone functions:

- Basic phone functions including hold, conference calling, transfer, redial, speed dialing, multiple “appearances” of lines and Caller ID.
  - Automatic Call Distribution (ACD)—provides the ability to hold a **call in a queue** until it can be answered.
  - IP Agent: an AVAYA software product that enables call agents to be **connected virtually** to a PBX ACD uses both a voice and data circuit to connect agents. Note: if agents are physically co-located in an office served by a PBX, they are direct-connected (no need for IP Agent).
  - Call Routing—ability to route calls to a specific queue based on menu selections or defaults are provided on regional PBXs.
  - Announcements—ability to record messages that play to callers when on hold.
  - Voice Mail—ability to record a message for a worker; can also provide call routing based on menu selections. Call center staff do not use voice mail.
- **Key Telephone Systems**—typically used in medium and small offices, this type of telephone system provides hold, conference calling, and transfer, redial and speed dialing.
  - **Voice and Data Networks**  
DSHS relies heavily on both the voice and data networks to conduct its business. These networks are large and complex. DIS manages our voice network which consists of:
    - All CSO telephone systems are connected to the **public switched network** for local calling.
    - The majority of CSOs use the state’s **long distance network**. A few small rural offices rely on the long distance services of AT&T, Sprint or X5.
    - **Dedicated T1 circuits** connect several CSO call center agents to the regional PBXs (more cost-effective than using long-distance network).
    - **Toll-Free Numbers** are purchased from vendors using state master contracts.
    - DSHS has a standalone, **dedicated data network**. Routers, servers and switches that comprise the data network are managed within DSHS. Frame relay services are purchased from DIS.
  - **Call Flow Configurations**  
A call flow (or routing) configuration is the PBX programming logic (steps) used to route calls to agents. Call routing commences once a customer dials a call center number.

Call flow configurations include call routing “menus” and conditional routing steps. DIS programs and maintains call routing configurations for CSD call centers.

An example of a simple call routing menu follows:

1. If between 5 pm to 8 am, route to after hour’s message
2. If no agents logged in, route to after hour’s message
3. Play initial greeting message
4. Play menu  
Press 1 for directions to office  
Press 2 for child care  
Press 3 medical
5. Hold in queue for next available agent
6. If call not answered in 20 seconds, play announcement 1.
7. If call not answered in 60 seconds, play announcement 2, and provide option to route to Answer Phone IVR system

For consistency (to clients) and to reduce maintenance efforts, standardized call flow configurations are used.

- **Call Distribution—Expert Agent**

Expert Agent Selection (EAS) is a set of features contained in the Avaya Automated Call Distribution (ACD) software. Currently, CSD call centers use “Splits” to determine where a call is routed based on menu selections. Agents log into one or more “Splits” based on program, alpha designations or other routing designs. Calls are routed to the most idle agent (the agent that has not been on a call the longest) available in the selected “Split”.

Expert Agent routes calls based on a preconfigured set of “Skills” and “Expertise” contained in an agents profile. A worker may have up to 60 different skills and 16 levels of expertise. The agent logs into the system once, rather than in multiple “Splits”. The callers’ menu choices and the skills and expertise of agents logged into the system determine how and to whom the call is routed. The Expert Agent software offers alternate methods of distributing calls to the agents. In addition to “Most Idle Agent” the software can distribute calls to the “Least Occupied Agent”, by “Percent of Allocation” or by a combination of methods to assist the organization achieve a specific service level; this feature is called “Service Level Maximizer”. The software will also support “Direct Agent calling” allowing a return call to a specific agent to complete a service initiated on a prior call.

- **Call Management System (CMS)**

CMS provides real time, historical and integrated (real time and historical) reporting of call center telephone activity. Data and reports are available at various levels and for numerous system components, including statewide, regional, call center, agent, vector and split. It provides real time data used by call center managers to monitor call activity make operational adjustments and then view the results. Real time CMS data is also displayed to call agents through Simon Desk View software (See Simon Desk View), providing them with useful information to manage their activities.

CMS is the primary tool utilized by operations and management to collect, store and retrieve performance data that is used to establish performance benchmarks and analyze trends. The Avaya Call Management System (CMS) software is a database, administration, and reporting application designed for enterprises that receive a large volume of telephone calls and have complex contact center operations. Working in conjunction with Avaya CMS, the Avaya Call Management System Supervisor client provides comprehensive administration and reporting capabilities using a familiar Microsoft Windows interface.

The Department of Information Services (DIS) owns and manages the CMS server which supports all of their PBXs statewide. Regional PBXs are connected, via the network, to the centralized server. The DIS operates these servers for all state agencies and uses a charge back basis for actual usage.

- **Interactive Voice Response Servers and Applications**

There are three “regional” IVR servers located in Olympia, Seattle and Spokane that are owned and managed by DIS. Each IVR is connected to a regional PBX, and DIS keeps maintenance active on the servers.

Applications that run on the IVR servers include:

- **The Answer Phone**—provides clients with basic information about their case, hear messages from their worker, hear appointment information, find out if their documents were received and acted upon, and receive information about their child care benefits. The Answer Phone is available when the clients want to call (24 hrs/day, 7 days/week). Access to the Answer Phone, however, is limited to callers dialing one toll-free number with the exception of Region 6 who incorporates access to the Answer Phone within its call flow.
- **Child Care Information Phone** (or WCIP)—Providers call this application to check on authorized service and approval periods, as well as co-payment amounts.
- **Zip Code Router**—When clients are unknown to the system, their calls are routed to local catchment areas based on the zip code the caller enters. This functionality enables one toll-free number to be used for the entire state.
- **Customer Survey**—is an application that gathers customer responses over the phone. It was designed to be used in two ways:
  - Stay on the line survey: Incorporated into call flows so a caller can stay on the line after conducting their business and answer a few questions.
  - Callback: The system calls customers back to ask and then record their responses.

This automated survey will be an excellent tool for call centers to use to gather customer feedback.

## Operational Costs

Costs displayed here are limited to telephony (voice and interactive voice response), and business applications that support all of CSD operations (storefronts and call centers).

### Call Center Specific Costs:

Agent Connections (IP Agent)/Month ..... \$30,000/month

Network Costs/Month (for additional T1 circuits)..... \$35,000/month

IVR applications (zip code router, screen pop, answer phone) ..... \$45,000/month

### Supporting Business Applications<sup>2</sup>:

Automated Client Eligibility System (ACES) ..... \$ 6 million/year  
Supports multiple divisions within DSHS

Barcode (an in-house server-based application with multiple sub-systems  
and interfaces with ACES, SSPS, JAS & CAMIS) ..... \$4.4 million/year

## Document Management System (DMS)

DMS is a sub-system of Barcode and costs approximately \$400K per year to operate. DMS cost approximately \$1.6 million to implement. Annual savings (calculated by subtracting operational DMS costs from net staff savings) is approximately \$5.5 million per year.<sup>3</sup>

## Performance Management

CSD currently uses two performance measures for its call centers: Average speed of Answer and a Service Level of 80% of calls answered in 180 seconds. Please refer to the attached call center report, page 40, for more detailed information on quality and performance measures.

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<sup>2</sup> Source: DSHS IT Portfolio

<sup>3</sup> Source: DMS Pilot Project Report, February 19, 2002