We Care Staff Guide

County of Santa Cruz
County of Santa Cruz
Human Services Department
1000 Emeline Avenue
Santa Cruz, CA 95060

County of Santa Cruz
HUMAN SERVICES
DEPARTMENT

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Introduction

MISSION STATEMENT

The Human Services Department strengthens our community by protecting the vulnerable, promoting self-sufficiency, alleviating poverty, and improving the quality of life.

We value:

- Excellent Service
- Compassion
- Integrity
- Partnerships
- Effective Practice

Motto: Dedicated to making a difference

ROLE OF A BENEFIT REPRESENTATIVE

The Employment and Benefit Services Division (EBSD) supports the HSD mission by providing vital benefits and services such as food assistance, health care benefits, cash assistance and employment services. Benefits Representatives have the critical role of determining initial and continuing eligibility for individuals and families. EBSD's goal is to consistently provide an "excellent customer experience" by ensuring that both internal and external customers feel:

- Welcomed and Comfortable
- Heard and Supported
- Accepted and Respected
- Informed and Empowered

Introduction

OPERATIONAL FRAMEWORK

The Operational Framework illustrates the four components of a customer's contact with the Department of Human Services.

- Customers have three basic needs: food, medical care and/or cash aid.
- Cases fall into two categories: new application or existing case. Customers are attempting to obtain and keep benefits as long as they are eligible.
- There are three venues where customers will interact: in-person, on the phone or via the Benefits Cal-WIN web site.
- There are three outcomes a customer may experience: that person may be approved/renewed, denied/discontinued or in a pending status that requires additional verifications. Regardless of the customer's status, he or she may be referred for additional services.

Food   Medical   Cash Aid Work Supports

New Application   Existing Case

Interaction Venues

In-Person   Phone   Web

Approve/Renew   Pending   Deny/Discontinue

Refer
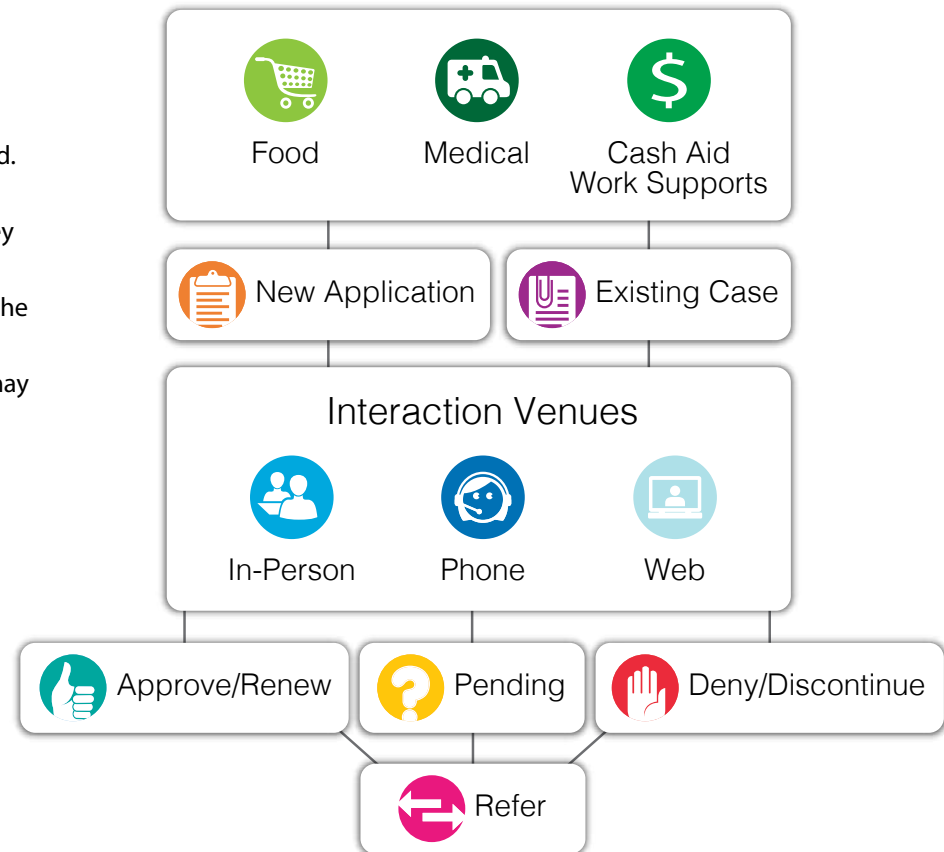
Introduction

WHAT IS WE CARE?

WE CARE is a customer interaction model designed to deliver an excellent customer experience of public assistance programs in Santa Cruz County through the effective application of cultural awareness, operating knowledge of technology, and the customer's emotional satisfaction of services and referral throughout their experience with the Human Services Department. Through the effective practice of WE CARE for phone contacts and face-to-face interactions, Benefit Representatives will execute a uniform customer service delivery experience that provides positive customer experience outcomes, customer satisfaction, and access to effective and caring service.

OPEN

Welcome and Personalize Greeting

- Welcome/greet the customer.
- Personalize conversation.

Engage and Clarify Expectations

- Confirm personal information.
- Determine/confirm reason for the call/visit.
- Set meeting/conversation expectations.
- Explain horizontal integration.

MIDDLE

Communicate and Gather Information

- Identify customer's needs.
- Gather information/review case comments.
- Complete application/ tasks.
- Confirm information.

Address Customer Needs

- Determine possible program eligibility.
- Explain status/timelines/case updates.
- Provide additional options/referrals.

CLOSE

Review and Resolve Questions and Concerns

- Verify understanding of status and next steps.
- Address questions and concerns.
- Confirm customer's needs have been addressed.

End on a Positive Note

- Provide information for future HSD contact.
- Thank customer.

Inbound Call for a Medi-Cal Renewal

WELCOME AND PERSONALIZE GREETING

"W" in WE CARE stands for "Welcome and Personalize Greeting" and includes two steps:

• Welcome/greet the customer.

• Personalize conversation.

The W is implemented differently, depending on how you are interacting with the customer: on the phone or in-person; for a new case or an existing case.

WELCOME/GREET THE CUSTOMER

• When the customer answers the phone, convey a professional manner. Reflect a cheerful tone and convey sincerity:
*"Hello, may I please speak with Mr./Ms. _____?
This is _____ (first name) calling from the County
of Santa Cruz Human Services Department."*

• If it is an unscheduled call, ask: *"Is this a good time to talk?"*

• If it is a scheduled call, ask: *"Is this still a good time to complete
your interview?"*

PERSONALIZE CONVERSATION

• Try to create a personal connection with the customer:
"I am so glad I was able to reach you."

• If appropriate, ask: *"May I call you by your first name?"*

VIDEO

Now we're going to view a short video showing how Benefit Representative Melissa greets a customer. The Benefit Representative is speaking with Alfredo, a self-employed tradesman seeking Medi-Cal coverage over the phone.

• Video start time: 3:30

• Pause video

CHECK FOR UNDERSTANDING

• What does "W" represent in the WE CARE model?
Welcome/greet the customer, and personalize the conversation.

• What was done correctly in this scenario?
(Allow trainees to discuss.)

• Should the Benefit Representative have called Alfredo by his first name? *Yes, this was appropriate because the Benefit Representative asked Alfredo's permission before doing so. Also, in some situations, calling the customer by his or her first name creates a personal connection during the interview.*

• Alfredo seemed frustrated and angry. Should the Benefit Representative tell him to calm down or suggest speaking to him at another time if the conversation is too difficult? *It's integral for the Benefits Representative to work to make the customer feel welcome and comfortable. Customers often times are living stressful lives, and it is important that the Benefits Representative understand their difficulties and try to provide services that will improve the customer's situation.*

Inbound Call for a Medi-Cal Renewal

ENGAGE AND CLARIFY EXPECTATIONS

The "E" in We Care stands for "Engage and Clarify Expectations" and includes four steps:

- Confirm personal information.
- Determine/confirm reason for the call/visit.
- Set meeting/conversation expectations.
- Explain horizontal integration.

This interaction will set the tone for the entire interview and is integral to communicating clearly with the customer.

CONFIRM PERSONAL INFORMATION

Example language to confirm the customer's personal information:

- *"In order to confirm your identity, can you please provide me with your Social Security Number?"*
- *"To ensure that the information we have is current, can you please provide me with your address and phone number?"*

SNAP Model – Use this tool to help you remember the personal information you must gather from a customer:

S S N

N A M E

A D D R E S S

P H O N E N U M B E R

IF AN EXISTING CASE: DETERMINE/CONFIRM REASON FOR THE CALL

- Ask and/or confirm the reason for the customer's call: *"You are calling today regarding your existing benefits, is that correct?"*
- Consult with the customer to ensure you understand the reason for his or her call.

Inbound Call for a Medi-Cal Renewal

SET CONVERSATION EXPECTATIONS

Provide an overview of the meeting/conversation process and what the customer can expect in terms of an outcome:

- *"Before we get started, I want to explain how we are going to work together to determine which programs you may be eligible."*

- *"We are first going to work together to address your questions/needs."*

- *"Afterwards, I would like to work with you to determine if there are any programs for which you may be eligible that you are not already receiving."*

- *"How does that sound to you?"*

- If applicable:

  - *"In order to _____ (specify reason for visit), I am going to ask you a series of questions including some about your financial situation and the composition of your household."*
    - *"Your role today is to provide me with as much information as possible."*
    - *"Some questions may be personal but are necessary. Are you OK with me asking these questions?"*

  - *"If we find that you are not eligible for the assistance you are seeking, I will direct you to some additional community resources that may be able to provide you support."*

  - *"Do you have any questions at this time about the potential outcomes of our meeting/conversation?"*

- *"To ensure that I accurately capture the information you give me, I will be entering data into our system as we go along."*

- *"I apologize, but there may be moments of silence as I type in your information. I will let you know if that is going to happen."*

  - *"I also will be reviewing the documents that we have already received."*

  - Interim process until upfront scanning is finalized. Look for documents in Fortis. *"Did you recently turn in some documents that I should look for?"*

HORIZONTAL INTEGRATION

Show respect for the customer's time and potential transportation or other timing conflicts. Provide an estimate of how long the conversation is expected to take based on the customer's specific situation, and explain why it may take awhile. Example language:

- *"The interview today may take up to _____, are you OK with that? In order to expedite the eligibility process, I need to ensure that I gather all of your information. However, I do want to be considerate of your time."*

  - *"Are there any timing issues for which we need to be mindful? If you are not able to complete the entire interview, we will do as much as we can and then have someone follow up with you to complete the process within three business days."*

- *"Thank you in advance for your patience."*

  - *"As I mentioned earlier, I am also going to screen you for other services/ programs in addition to _____ (name of program that they came in for.) These services/programs may include _____ (name of program as applicable)."*

Inbound Call for a Medi-Cal Renewal

▶ VIDEO

Now we're going to return to the video to show Benefit Rep Melissa interviewing Alfredo about his lapsed Medi-Cal benefits.

- Video start time: 5:00
- Pause video

✔ CHECK FOR UNDERSTANDING

- What does "E" represent in the WE CARE model? *Confirm personal information; determine/confirm reason for the call/visit; set meeting/conversation expectations; explain horizontal integration.*

- What was done correctly in this scenario? *(Allow trainees to discuss.)*

- How did the Benefit Representative accurately utilize Horizontal Integration? *The Benefit Representative let Alfredo know she would check to see if he is eligible for other programs, such as food assistance, while completing his Medi-Cal renewal. She will address his immediate need first and then can come back to Horizontal Integration later in the interview, when he might be more receptive to hearing about other services.*

- Why did the Benefit Representative ask the customer for a call-back number? *Obtaining a call-back number accomplishes two things. One, it allows the Benefit Representative to immediately call back if she and the customer are disconnected. Two, it establishes the contact number for the customer.*

Inbound Call for a Medi-Cal Renewal

COMMUNICATE AND GATHER INFORMATION

The "C" in WE CARE stands for "Communicate and Gather Information" and includes four steps:

• Identify customer's needs.

• Gather information/review case comments.

• Complete application/tasks.

• Confirm information.

This is the data collection portion of the interview and can be quite lengthy. Be sure to check-in regularly with your customer to ensure he or she understands the process.

IF AN EXISTING CASE

• While the customer responds to questions, maintain an empathetic rapport.

• Listen for and try to identify the customer's unstated needs.

• Strive to remain warm and welcoming throughout the data-gathering phase.

Consult with the customer to ensure you understand the reason for his or her call/visit.

IDENTIFY CUSTOMER'S NEEDS

Clarify why the customer is seeking assistance:

• *"You mentioned earlier that you were seeking _____ assistance. Can we discuss your current situation a bit further?"*

Inquire into:

• The customer's questions, needs, or concerns.

• Changes to the customer's status or eligibility.

• The steps the customer has taken to maintain or update his or her benefits.

Remain nonjudgmental regarding the action(s) the customer has or has not taken to maintain or update his or her benefits. For example, instead of saying, *"You did not turn in your SARS 7,"* say, *"We have not received your SARS 7."*

Inbound Call for a Medi-Cal Renewal

GATHER INFORMATION/REVIEW CASE COMMENTS

Please note: If you experience technical difficulties and need to trouble shoot, finish as much of the interview as possible and then leave the case as pending. (Refer to page 40.)

- Remain warm and welcoming during the data-gathering phase.
- Explain to the customer that your review may take up to 10 minutes.
- Remind the customer that you will ask a series of questions and briefly summarize why you need the information (for example check for eligibility, get basic information, etc.). Explain that you will need to type his or her responses into the system.
- Let the customer know what you will be doing prior to reviewing his or her case information and documents:
  - *"It looks as though we received a document/verification from you."*
  - *"Do you mind holding while I review these documents? It may take up to 10 minutes."*

CONFIRM INFORMATION

- Confirm the information with the customer as you go along:
  - BR: *"When is your rent due?"*
  - Customer: *"I pay it around the 5th of the month."*
  - BR: *"To confirm, your rent is paid on the 5th of each month. Is that correct?"*

Complete application/tasks/case updates.

VIDEO

Now we're going to return to the video to show Benefit Rep Melissa interviewing Alfredo about his lapsed Medi-Cal benefits.

- Video start time: 7:30
- Pause video

CHECK FOR UNDERSTANDING

- What does "C" represent in the WE CARE model? *Identify customer's needs; gather information/review case comments; complete application/tasks; confirm information.*
- What was done correctly in this scenario? *(Allow trainees to discuss.)*
- Why is it important to reiterate the answer a customer gives? *Repeating the customer's answers confirms the Benefit Representative correctly heard the customer. It also reinforces that the Benefit Representative understand the customer's needs and it imparts to the customer that the Benefit Representative is listening.*

Inbound Call for a Medi-Cal Renewal

ADDRESS CUSTOMER NEEDS

The "A" in WE CARE stands for "Address Customer Needs" and includes three steps:

- Determine possible program eligibility.
- Explain status/timelines/case updates.
- Provide additional options/referrals.

This interaction focuses on addressing all of the needs of the customer, including eligibility, benefit issuance timelines and referrals.

IF AN EXISTING CASE: DETERMINE POSSIBLE PROGRAM ELIGIBILITY

As you review the customer's information for eligibility, keep him or her apprised of your progress.

- *"I think I have everything I need, but let me double check just to be sure."*
- *"I'm almost done. Are you doing OK on time?"*

Explain to the customer that his or her benefits will be based on his or her specific circumstances and that the details of his or her benefits will be provided when all of the program eligibility pieces are verified.

EXPLAIN STATUS/TIMELINES

Provide the customer with the date by which they need to complete their actions steps. Confirm that the customer understands their next steps:

"We are missing some information needed to process your case."

- Inform the customer of what they are missing.
- Explain that the process cannot move forward without the required document(s).
- Explain how the customer can get the information to the County.
- Let the customer know that the County will send him or her a checklist of the missing information.
- Confirm with the customer that he or she understands what is being requested and ask him or her if they have any question or concerns about the missing documents.

Example language:

- *"I am going to send you a checklist confirming the information you still need to provide us. To avoid discontinuance of benefits, please submit the verification by_____."*
- *"Do you have any questions regarding what documents are needed or how you can get us the information?"*

Provide the customer with HSD's action items including the timeline for which they can expect to get their benefits once all necessary information has been provided:

- CalFresh – 30 days
- Medi-Cal – 45 days
- CalWorks – 45 days
- GA – 45 days

Inbound Call for a Medi-Cal Renewal

PROVIDE ADDITIONAL OPTIONS/REFERRALS

Verbalize an empathetic understanding that the assistance or the timing of the assistance may not meet the customer's expectations or needs. Ask the customer about how he or she is feeling, and inquire into his or her concerns or questions.

If the customer does not quality for benefits as hoped, ask the customer if you can work with him or her on some alternative solutions:

- *"I am sorry, but you currently do not meet program requirements for _____* (state the program for which they came in for but are not eligible). *If _____* (specify what would need to happen to make the customer eligible for the program) *changes please contact us right away so that we can reassess your eligibility for assistance."*

- *"Would it be helpful if we try to identify some alternative ways for you to get _____?"*

- *"Would you like me to provide you with the contact information for community resources that may be able to assist you?"*

- *"Please contact 211 for help with _____* (give the appropriate service). *It is free, confidential, and available 24 hours a day."* (If the conversation is conducted in Spanish, let the customer know that 211 also provides assistance in Spanish.) "*You may also use the 211 web site at 211bayarea.org and choose Santa Cruz."* Let the customer know that the web site will ask a lot of questions.

If the customer needs food assistance provide the Second Harvest Food Bank Hotline number – 831-662-0991, available Monday-Friday 8am-4pm in English and Spanish.

If the customer needs immediate non-emergency medical assistance provide the following information:

- Dominican Hospital Emergency Room: 831-462-7700; 1555 Soquel Drive, Santa Cruz; Online Emergency Room waiting: dominicanhospital.org.

- Watsonville Community Hospital Emergency Room: 831-724-4741; 75 Nielson Street, Watsonville.

▶ VIDEO

Now we're going to return to the video to show Benefit Rep Melissa interviewing Alfredo about his lapsed Medi-Cal benefits.

- Video start time: 8:29

- Pause video

✔ CHECK FOR UNDERSTANDING

- What does "A" represent in the WE CARE model? *Determine possible program eligibility; explain status/timelines/case updates; provide additional options/referrals.*

- What was done correctly in this scenario? *(Allow trainees to discuss.)*

- Why is it important to clarify and confirm timelines with the customer? *Being clear about timelines with the customer helps the customer be aware deadlines he or she may need to meet. This practice also helps the customer understand how long it will take for eligibility will be determined.*

Inbound Call for a Medi-Cal Renewal

REVIEW AND RESOLVE QUESTIONS AND CONCERNS

The "R" in WE CARE stands for "Review and Resolve Questions and Concerns" and includes three steps:

• Verify understanding of status and next steps.

• Address questions and concerns.

• Confirm customer's needs have been addressed.

The step ensures attempts have been made to meet all of the customer's needs and that the customer understands the status of the eligibility for services.

VERIFY UNDERSTANDING OF STATUS AND NEXT STEPS

Verify that the customer understands his or her eligibility for benefits, benefit status, and next steps. State as applicable:

"As we discussed,…

• *"You are eligible for _____ benefits. We will be providing you with _____ information within _____ days."*

• *"In order to continue processing your benefits, you need to provide us with _____ document(s)."*

• *"To avoid discontinuance of benefits, please turn in the verification by _____."*

• *"I will send you a checklist confirming the information you still need to provide us."*

• *"You will be receiving information in the mail notifying you of any changes in your eligibility."*

• *"Please notify us if there are any changes in your circumstances including your income. Do you have any questions regarding what changes to report?"*

• *"If you have any additional questions, please contact us at 1-888-421-8080 or come to one of our offices. Any of our many Benefit Representatives will be able to assist you."*

• *"I am again sorry that you did not qualify for the assistance you were seeking. However, you now have contact information for _____* (name of agency) *who can provide you with _____* (type of assistance)."

• *"You now have the contact information for _____* (name of agency) *who can provide you with _____* (type of assistance) *while you wait for your benefits to become active."*

"Do you have any questions regarding your benefit eligibility, next steps, or what to expect from us?"

Inbound Call for a Medi-Cal Renewal

ADDRESS QUESTIONS AND CONCERNS

Verify that you have addressed all of the customers concerns and questions:

- *"Is there anything else I can help you with at this time?"*
- *"Do you have any additional questions or concerns that you would like to discuss?"*

Examples of how you might phrase responses to customers' questions:

- *"Information on the specific medical services available as part of your insurance plan, such as prescriptions or procedures, need to be addressed directly by your insurance company or plan provider. Would you like me to provide you with the appropriate contact information?"*
  - Central California Alliance for Health (CCAH): 1-800-700-3874
  - Covered CA: 1-800-300-1506
- *"I would be happy to discuss _____ further with you. Program eligibility is determined by factors such as an individual's age, income, and resources. Does that help?"*
- *"I would be happy to help you with _____. Reports completed correctly make the process easier for everyone. Be sure to answer all of the questions. If the answer to any question is 'Yes', please provide supporting documentation. Does that make sense?"*

CONFIRM CUSTOMER'S NEEDS HAVE BEEN ADDRESSED

Verify that all of the customer's needs, concerns, and questions have been addressed. Example language:

- *"Have I answered all of your questions?"*
- *"Is there anything else I can help you with today?"*

VIDEO

Now we're going to return to the video to show Benefit Rep Melissa speaking Alfredo about renewing his Medi-Cal benefits.

- Video start time: 9:30
- Pause video

CHECK FOR UNDERSTANDING

- What does "R" represent in the WE CARE model? *Verify understanding of status and next steps; address questions and concerns; confirm customer's needs have been addressed.*
- What was done correctly in this scenario? *(Allow trainees to discuss.)*
- Why does the customer need to understand the importance of turning in verification information? *Emphasizing the importance of submitting verification information to the customer helps the customer understand there are additional steps he or she must take to complete the application process.*

Inbound Call for a Medi-Cal Renewal

E ND ON A POSITIVE NOTE

The "E" in WE CARE stands for "End on a Positive Note." It includes two steps:

- Provide information for future HSD contact.
- Thank customer.

Leaving the customer with a good feeling about the interaction creates a positive relationship for future interactions with HSD.

PROVIDE INFORMATION FOR FUTURE HSD CONTACT

"Before we close our conversation, I want ensure you know how to get in touch with us in the future."

- *"We will send you a contact information card in the mail which will have your case number on it for future reference and information on where to contact us."*

  Customer Service Centers – Monday-Friday 8am-5pm

  - 1020 Emeline Avenue, Santa Cruz
  - 18 West Beach Street, Watsonville

  Phone: 888-421-8080, Monday-Friday, 7:30am-5:30pm

  County web site: santacruzhumanservices.org

  My Benefits CalWIN: mybenefitscalwin.org

THANK CUSTOMER

"Thank you for taking the time to talk with me. Enjoy the rest of your day."

VIDEO

Now we're going to watch the end of the video to show Benefit Rep Melissa speaking Alfredo about renewing his Medi-Cal benefits.

- Video start time: 10:04
- Pause video

CHECK FOR UNDERSTANDING

- What does "E" represent in the WE CARE model?
  Provide information for future HSD contact and thank the customer.
- What was done correctly in this scenario?
  (Allow trainees to discuss.)

Face-to-Face Interview for a New Application

WELCOME AND PERSONALIZE GREETING

"W" in WE CARE stands for "Welcome and Personalize Greeting" and includes two steps:

• Welcome/greet the customer.

• Personalize conversation.

The W is implemented differently, depending on how you are interacting with the customer: on the phone or in-person; for a new case or an existing case. Here we will explore how the W is implemented in a face-to-face interview for a client with a new application.

WELCOME/GREET THE CUSTOMER

At every opportunity try to make the customer feel welcome and comfortable.

As you walk up, look the customer in the eye and have a natural, pleasant expression on your face. Remember, your body language will help set the tone of the interaction. If appropriate and comfortable, extend your hand as you greet them:

"Welcome to the Human Service Department.
My name is _____ (first name).
I appreciate you coming in today."

PERSONALIZE CONVERSATION

• Try to create a personal connection with the customer.

• Explain to the customer why you called a number and not their name: *"Please excuse me for identifying you by a number; we use the number system to maintain your privacy."*

• Show respect for the customer's time by addressing long waits, if applicable; make an empathetic statement before proceeding with your conversation: *"Thank you for waiting. I understand the wait times today are quite lengthy. I really appreciate your patience and am glad we can now meet."*

• When inviting a customer to an interview room, address them in a way that conveys a sense of welcome. Rather than state "follow me" and turn your back to the customer, while you walk to the interview room, step to one side, as allowable, gesture with your hand and arm for the customer to walk in the direction of the interview room along with you; open and hold doors for the customer; and make eye contact: *"We'll be going to the first/second/etc. interview room down on the right/left. Would you please walk with me?"*

• Once you are in an interview room introduce yourself again: *"Thank you for coming in Mr./Ms._____ (last name). My name is _____ (first name)."*

• If appropriate, ask: *"May I call you by your first name?"*

Face-to-Face Interview for a New Application

VIDEO

Now we're going to view a short video showing how a Benefit Representative greets a customer. The Benefit Representative is meeting with Erica, a mother who recently became homeless and is seeking benefits through the Department of Human Services for the first time.

- Video start time: 11:33
- Pause video

CHECK FOR UNDERSTANDING

- What does "W" represent in the WE CARE model? *Welcome/greet the customer, and personalize the conversation.*

- What was done correctly in this scenario? *(Allow trainees to discuss.)*

- Why did the Benefit Represented identify Erica by a number? *We use the number system to maintain customers' privacy. The Benefit Representative accomplished this by using the number, and also explained to Erica why the number was necessary, which is important to making the customer feel comfortable and respected.*

- Is it OK for clients to bring children into interviews? *Yes, you should try at every opportunity to make the customer feel welcome and comfortable. If the customer has children, welcoming them into the meeting and engaging with them is an appropriate way to make everyone feel at ease.*

Face-to-Face Interview for a New Application

ENGAGE AND CLARIFY EXPECTATIONS

The "E" in WE CARE stands for "Engage and Clarify Expectations" and includes four steps:

• Confirm personal information.

• Determine/confirm reason for the call/visit.

• Set meeting/conversation expectations.

• Explain horizontal integration.

This interaction will set the tone for the entire interview and is integral to communicating clearly with the customer.

CONFIRM PERSONAL INFORMATION

Example language to confirm the customer's personal information:

"In order to confirm your identity, can you please provide me with your Social Security Number?"

SNAP Model – Use this tool to help you remember the personal information you must gather from a customer:

S SN

N AME

A DDRESS

P HONE NUMBER

IF A NEW CASE: DETERMINE/CONFIRM REASON FOR THE VISIT

Ask and/or confirm the reason for the customer's visit: *"You are here today to apply for benefits. Is that correct?"*

Consult with the customer to ensure you understand the reason for his or her visit.

Face-to-Face Interview for a New Application

SET MEETING EXPECTATIONS

Provide an overview of the meeting/conversation process and what the customer can expect in terms of an outcome:

- *"Before we get started, I want to explain how we are going to work together to determine the programs for which you may be eligible."*

- *"I am going to ask you a series of questions including some about your financial situation and the composition of your household. These questions will help me determine what kind of assistance you may quality for. How does that sound?"*

- *"Your role today is to provide me with as much information as possible so that I can make some initial eligibility determinations. If we determine that you are eligible for one or more programs, I will give you more information at the end of the conversation about next steps."*

  - *"I may ask some questions that are awkward or personal. Are you OK with me asking these questions?"*

- *"If we find that you are not eligible for the assistance you are seeking, I will direct you to some additional community resources that may be able to provide you support."*

- *"Do you have any questions at this time about the potential outcomes of our meeting?"*

- *"To ensure that I accurately capture the information you give me, I will be entering data into our system as we go along."*

- *"I apologize, but I may have to pause our conversation for a few moments as I type in your information. I will let you know if that is going to happen."*

- Look for documents in Fortis. Say, *"Do you have any documents that you wish to provide me with or did you recently turn in some documents that I should look for?"*

HORIZONTAL INTEGRATION

- *"As I mentioned earlier, I am also going to screen you for other services in addition to _____ (name of program that they came in for). These services may include _____ (name of program as applicable)."*

Show respect for the customer's time and potential transportation or other timing conflicts. Provide an estimate for how long the conversation is expected to take based on the customer's specific situation, and explain why it may take awhile. Example language:

- *"The interview today may take up to 1.5 hours. Are you OK with that? In order to expedite the eligibility process, I need to ensure that I gather all of your information. However, I do want to be considerate of your time."*

- *"Are there any transportation or other timing issues about which we need to be mindful? If you are not able to stay for the entire interview, we will do as much as we can and than have someone follow-up with you to complete the process within three business days."*

- *"Thank you in advance for your patience."*

Face-to-Face Interview for a New Application

▶ VIDEO

Now we're going to return to the video to show Benefit Rep Brett speaking with Erica about how to obtain benefits for her and her son.

- Video start time: 12:58
- Pause video

✔ CHECK FOR UNDERSTANDING

- What does "E" represent in the WE CARE model? *Confirm personal information; determine/confirm reason for the call/visit; set meeting/conversation expectations; explain horizontal integration.*

- What was done correctly in this scenario? *(Allow trainees to discuss.)*

- How did the Benefit Representative accurately utilize Horizontal Integration? *Brett clearly stated the programs and services the customer may be eligible for and explained that they would work together to determine what assistance she would receive. He offered her programs beyond the original assistance she was seeking.*

Face-to-Face Interview for a New Application

COMMUNICATE AND GATHER INFORMATION

The "C" in WE CARE stands for "Communicate and Gather Information" and includes four steps:

- Identify customer's needs.
- Gather information/review case comments.
- Complete application/tasks.
- Confirm information.

This is the data collection portion of the interview and can be quite lengthy. Be sure to check in regularly with your customer to ensure he or she understands the process.

IF A NEW CASE

- While the customer responds to questions, maintain an empathetic rapport.
- Listen for and try to identify the customer's unstated needs.
- Strive to remain warm and welcoming throughout the data-gathering phase.

Consult with the customer to ensure you understand the reason for his or her call/visit.

IDENTIFY CUSTOMER'S NEEDS

Inquire into:

- The customer's questions, needs, or concerns.
- The steps the customer has taken to maintain or update his or her benefits.

Remain nonjudgmental regarding the action(s) the customer has or has not taken to maintain or update his or her benefits.

Face-to-Face Interview for a New Application

GATHER INFORMATION/REVIEW CASE COMMENTS

Please note: If you experience technical difficulties and need to troubleshoot, finish as much of the interview as possible and then leave the case as pending. (Refer to page 40.)

- Remain warm and welcoming during the data gathering phase.
- Explain to the customer that your review may take up to 10 minutes.
- Remind the customer that you will ask a series of questions and briefly summarize why you need the information (for example, to check for eligibility, get basic information, etc.). Explain that you will need to type his or her responses into the system.
- Let the customer know what you will be doing prior to reviewing his or her case information and documents:
  - *"It looks as though we received a document/verification from you."*
  - *"Do you mind waiting while I review these documents? It may take up to 10 minutes."*

CONFIRM INFORMATION

- Confirm the information with the customer as you go along:
  - BR: *"When is your rent due?"*
  - Customer: *"I pay it around the 5th of the month."*
  - BR: *"To confirm, your rent is paid on the 5th of each month. Is that correct?"*

Complete application/tasks/case updates.

VIDEO

Now we're going to return to the video to show Benefit Rep Brett speaking with Erica about how to obtain benefits for her and her son.

- Video start time: 14:59
- Pause video

CHECK FOR UNDERSTANDING

- What does "C" represent in the WE CARE model? *Identify customer's needs; gather information/ review case comments; complete application/tasks; confirm information.*
- What was done correctly in this scenario? (Allow trainees to discuss.)
- Why is it important to review and update case comments? *In order to achieve a consistent customer experience, it is critical to maintain accurate case comments. This ensures future Benefit Representatives have the information available to provide excellent customer service and maintains continuity in service.*

Face-to-Face Interview for a New Application

ADDRESS CUSTOMER NEEDS

The "A" in WE CARE stands for "Address Customer Needs" and includes three steps:

• Determine possible program eligibility.

• Explain status/timelines/case updates.

• Provide additional options/referrals.

This interaction focuses on addressing all of the needs of the customer, including eligibility, benefit issuance timelines and referrals.

IF A NEW CASE: DETERMINE POSSIBLE PROGRAM ELIGIBILITY

As you review the customer's information for eligibility, keep him or her apprised of your progress.

• *"I think I have everything I need, but let me double check just to be sure."*

• *"I'm almost done. Are you doing OK on time?"*

Explain to the customer that eligibility will be based on individual circumstances when all of the required information is verified.

EXPLAIN STATUS/TIMELINES

Provide the customer with the date by which they need to complete their actions steps. Confirm that the customer understands their next steps:

"We are missing some information needed to process your case."

• Inform the customer of what they are missing.

• Explain that the process cannot move forward without the required document(s).

• Explain how the customer can get the information to the County.

• Let the customer know that the County will send him or her a checklist of the missing information.

• Confirm with the customer that he or she understands what is being requested and ask him or her if they have any question or concerns about the missing documents.

Example language:

• *"Here is a checklist confirming the information you still need to provide us. To avoid discontinuance of benefits, please submit the verification by_____."*

• *"Do you have any questions regarding what documents are needed or how you can get us the information?"*

Provide the customer with HSD's action items including the timeline for which they can expect to get their benefits once all necessary information has been provided:

• CalFresh – 30 days   • Medi-Cal – 45 days

• CalWorks – 45 days   • GA – 45 days

PROVIDE ADDITIONAL OPTIONS/REFERRALS

Verbalize an empathetic understanding that the assistance or the timing of the assistance may not meet the customer's expectations or needs. Ask the customer about how he or she is feeling, and inquire into his or her concerns or questions.

If the customer does not qualify for benefits as hoped, ask the customer if you can work with him or her on some alternative solutions:

- *"I am sorry, but you currently do not meet program requirements for _____* (state the program for which they came in for but are not eligible). *If _____* (specify what would need to happen to make the customer eligible for the program) *changes, please contact us right away so that we can reassess your eligibility for assistance."*

- *"Would it be helpful if we try to identify some alternative ways for you to get _____?"*

- *"Would you like me to provide you with the contact information for community resources that may be able to assist you?"*

- *"Please contact 211 for help with _____* (give the appropriate service). *It is free, confidential, and available 24 hours a day."* (If the conversation is conducted in Spanish, let the customer know that 211 also provides assistance in Spanish.) *"You may also use the 211 web site at 211bayarea.org and choose Santa Cruz."* Let the customer know that the web site will ask a lot of questions.

If the customer needs food assistance provide the Second Harvest Food Bank Hotline number – 831-662-0991, available Monday-Friday 8am-4pm in English and Spanish.

If the customer needs immediate non-emergency medical assistance provide the following information:

- Dominican Hospital Emergency Room: 831-462-7700; 1555 Soquel Drive, Santa Cruz; Online Emergency Room waiting: dominicanhospital.org.

- Watsonville Community Hospital Emergency Room: 831-724-4741; 75 Nielson Street, Watsonville.

VIDEO

Now we're going to return to the video to show Benefit Rep Brett speaking with Erica about how to obtain benefits for her and her son.

- Video start time: 16:13
- Pause video

CHECK FOR UNDERSTANDING

- What does "A" represent in the WE CARE model? *Determine possible program eligibility; explain status/timelines/case updates; provide additional options/referrals.*

- What was done correctly in this scenario? (Allow trainees to discuss.)

- Why is it important to clarify and confirm timelines with the customer? *Being clear about timelines with the customer helps the customer be aware deadlines he or she may need to meet. This practice also helps the customer understand how long it will take for eligibility will be determined.*

- What is the most comprehensive referral service available in Santa Cruz? *211*

Face-to-Face Interview for a New Application

REVIEW AND RESOLVE QUESTIONS AND CONCERNS

The "R" in WE CARE stands for "Review and Resolve Questions and Concerns" and includes three steps:

* Verify understanding of status and next steps.
* Address questions and concerns.
* Confirm customer's needs have been addressed.

The step ensures attempts have been made to meet all of the customer's needs and that the customer understands the status of the eligibility for services.

VERIFY UNDERSTANDING OF STATUS AND NEXT STEPS

Verify that the customer understands his or her eligibility for benefits, benefit status, and next steps. State as applicable:

"As we discussed,…"

* *"You are eligible for _____ benefits. We will be providing you with _____ information within _____ days."*
* *"In order to continue processing your benefits, you need to provide us with _____ document(s)."*
* *"To avoid discontinuance of benefits, please turn in the verification by _____."*
* *"I am going to send you a checklist confirming the information you still need to provide us."*
* *"You will receive information in the mail notifying you of any changes in your eligibility."*
* *"Please notify us if there are any changes in your circumstances including your income. Do you have any questions regarding what changes to report?"*

* *"If you have any additional questions, please contact us at 1-888-421-8080 or come to one of our offices. Any of our many Benefit Representatives will be able to assist you."*
* *"I am again sorry that you did not qualify for the assistance you were seeking. However, you now have contact information for _____ (name of agency) who can provide you with _____ (type of assistance)."*
* *"You now have the contact information for _____ (name of agency) who can provide you with _____ (type of assistance) while you wait for your benefits to become active."*

"Do you have any questions regarding your benefit eligibility, next steps, or what to expect from us?"

Face-to-Face Interview for a New Application

ADDRESS QUESTIONS AND CONCERNS

Verify that you have addressed all of the customers concerns and questions:

- *"Is there anything else I can help you with at this time?"*

- *"Do you have any additional questions or concerns that you would like to discuss?"*

Examples of how you might phrase responses to customers' questions:

- *"Information on the specific medical services available as part of your insurance plan, such as prescriptions or procedures, need to be addressed directly by your insurance company or plan provider. Would you like me to provide you with the appropriate contact information?"*

  - Central California Alliance for Health (CCAH): 1-800-700-3874

  - Covered CA: 1-800-300-1506

- *"I would be happy to discuss _____ further with you. Program eligibility is determined by factors such as an individual's age, income, and resources. Does that help?"*

- *"I would be happy to help you with _____. Reports completed correctly make the process easier for everyone. Be sure to answer all of the questions. If the answer to any question is 'Yes', please provide supporting documentation. Does that make sense?"*

CONFIRM CUSTOMER'S NEEDS HAVE BEEN ADDRESSED

Verify that all of the customer's needs, concerns, and questions have been addressed. Example language:

- *"Have I answered all of your questions?"*

- *"Is there anything else I can help you with today?"*

VIDEO

Now we're going to return to the video to show Benefit Rep Brett speaking with Erica about how to obtain benefits for her and her son.

- Video start time: 17:49

- Pause video

CHECK FOR UNDERSTANDING

- What does "R" represent in the WE CARE model? *Verify understanding of status and next steps; address questions and concerns; confirm customer's needs have been addressed.*

- What was done correctly in this scenario? *(Allow trainees to discuss.)*

- Why is it important to review the services a customer will receive? *Reviewing the services a customer will receive with her confirms the client's needs have been met and she understands the benefits she will receive.*

Face-to-Face Interview for a New Application

E ND ON A POSITIVE NOTE

The "E" in WE CARE stands for "End on a Positive Note." It includes two steps:

• Provide information for future HSD contact.

• Thank customer.

Leaving the customer with a good feeling about the interaction creates a positive relationship for future interactions with HSD.

PROVIDE INFORMATION FOR FUTURE HSD CONTACT

"Before we close our conversation, I want ensure you know how to get in touch with us in the future."

• Hand the customer an information card with their case number written on it:

• *"Here is our contact information card with your case number on it for future reference."*

Customer Service Centers – Monday-Friday 8am-5pm

• 1020 Emeline Avenue, Santa Cruz

• 18 West Beach Street, Watsonville

Phone: 888-421-8080, Monday-Friday, 7:30am-5:30pm

County web site: santacruzhumanservices.org

My Benefits CalWIN: mybenefitscalwin.org

THANK CUSTOMER

• *"Thank you for meeting with me."*

• Walk with the customer back to the lobby.

VIDEO

Now we're going to return to the video to see the conclusion of Benefit Rep Brett helping Erica and her son.

• Video start time: 18:38

• Pause video

CHECK FOR UNDERSTANDING

• What does "E" represent in the WE CARE model? *Provide information for future HSD contact and thank the customer.*

• What was done correctly in this scenario? *(Allow trainees to discuss.)*

Outbound Call for a CalFresh Application

WELCOME AND PERSONALIZE GREETING

"W" in WE CARE stands for "Welcome and Personalize Greeting" and includes two steps:

• Welcome/greet the customer.

• Personalize conversation.

The W is implemented differently, depending on how you are interacting with the customer: on the phone or in-person; for a new case or an existing case.

WELCOME/GREET THE CUSTOMER

At every opportunity try to make the customer feel welcome and comfortable.

• When you answer the phone, convey a professional manner. Reflect a cheerful tone and convey sincerity: *"Thank you for calling the Human Services Department. This is _____ (first name) calling from the County of Santa Cruz Human Services Department."*

PERSONALIZE CONVERSATION

• Show respect for the customer's time by proactively addressing long waits, if applicable. Make an empathetic statement before proceeding with your conversation: *"Thank you for holding. I understand the wait times today are quite lengthy. I really appreciate your patience and am glad we can now talk".*

• Try to create a personal connection with the customer: *"May I please have your name and, if you have one, your case number? Thank you."*

• If appropriate, ask: May I call you by your first name?

• Obtain callback number: *"May I please have your telephone number in case we are disconnected? If we get disconnected, I will call you back."*

▶ VIDEO

Now we're going to view a short video showing how a Benefit Representative greets a customer. The Benefit Representative is speaking with Christina, a 20-year-old college student seeking CalFresh benefits, on the phone.

• Video start time: 20:07

• Pause video

✔ CHECK FOR UNDERSTANDING

• What does "W" represent in the WE CARE model? *Welcome/greet the customer, and personalize the conversation.*

• What was done correctly in this scenario? *(Allow trainees to discuss.)*

• Should the Benefit Representative have called Christina by her first name? *In some situations, calling the customer by his or her first name creates a personal connection during the interview.*

Outbound Call for a CalFresh Application

ENGAGE AND CLARIFY EXPECTATIONS

The "E" in WE CARE stands for "Engage and Clarify Expectations" and includes four steps:

• Confirm personal information.

• Determine/confirm reason for the call/visit.

• Set meeting/conversation expectations.

• Explain horizontal integration.

This interaction will set the tone for the entire interview and is integral to communicating clearly with the customer.

CONFIRM PERSONAL INFORMATION

Example language to confirm the customer's personal information:

• *"In order to confirm your identity, can you please provide me with your Social Security Number?"*

• *"To ensure that the information we have is current, can you please provide me with your address and phone number?"*

SNAP Model – Use this tool to help you remember the personal information you must gather from a customer:

S S N

N A M E

A D D R E S S

P H O N E N U M B E R

IF A NEW CASE: DETERMINE/CONFIRM REASON FOR THE CALL

• Ask and/or confirm the reason for the customer's call/visit: *"I am calling from the County of Santa Cruz Human Services Department regarding your application for CalFresh. Do you have time to complete your interview today?"*

• Consult with the customer to ensure you understand the reason for his or her call.

SET CONVERSATION EXPECTATIONS

Provide an overview of the conversation process and what the customer can expect in terms of an outcome:

- *"Before we get started, I want to explain how we are going to work together to determine which programs you may be eligible."*

- *"I am going to ask you a series of questions including some about your financial situation and the composition of your household. These questions will help me determine what kind of assistance you may qualify for. How does that sound?"*

- *"Your role today is to provide me with as much information as possible so that I can make some initial eligibility determinations. If we determine that you are eligible for one or more programs, I will give you more information at the end of the conversation about next steps."*

  - *"I may ask some questions that are personal but necessary. Are you OK with me asking these questions?"*

- *"If we find that you are not eligible for the assistance you are seeking, I will direct you to some additional community resources that may be able to provide you support."*

- *"Do you have any questions at this time about the potential outcomes of our conversation?"*

- *"To ensure that I accurately capture the information you give me, I will be entering data into our system as we go along."*

  - *"I apologize, but there may be moments of silence as I type in your information. I will let you know if that is going to happen."*

  - *"I also will be reviewing the documents that we have already received."*

- Interim process until upfront scanning is finalized. Look for documents in Fortis. *"Did you recently turn in some documents that I should look for?*

HORIZONTAL INTEGRATION

- *"As I mentioned earlier, I am also going to screen you for other services/ programs in addition to _____ (name of program that they came in for.) These services/programs may include _____ (name of program as applicable)."*

Show respect for the customer's time and potential transportation or other timing conflicts. Provide an estimate of how long the conversation is expected to take based on the customer's specific situation, and explain why it may take awhile. Example language:

  - *"The interview today may take up to 1.5 hours. Are you OK with that? In order to expedite the eligibility process, I need to ensure that I gather all of your information. However, I do want to be considerate of your time."*

    - *"Are there any timing issues for which we need to be mindful? If you are not able to complete the entire interview we will do as much as we can and than have someone follow-up with you to complete the process within three business days."*

- *"Thank you in advance for your patience."*

Outbound Call for a CalFresh Application

VIDEO

Now we're going to return to the video to show Benefit Rep Barbara interviewing Christina, the college student seeking CalFresh aid.

• Video start time: 20:52

• Pause video

CHECK FOR UNDERSTANDING

• What does "E" represent in the WE CARE model? *Confirm personal information; determine/confirm reason for the call/visit; set meeting/conversation expectations; explain horizontal integration.*

• What was done correctly in this scenario? *(Allow trainees to discuss.)*

• Christina was pressed for time. How did the Benefits Representative address her concerns about the length of the interview? *The Benefits Representative effectively communicated the estimated length of the interview and repeatedly checked in with Christina to find out if she has enough time to continue the interview.*

• How did the Benefit Representative accurately utilize Horizontal Integration? *Barbara informed the customer she also would check to determine if the customer was eligible for additional services while reviewing her Cal-Fresh application.*

Outbound Call for a CalFresh Application

Communicate and gather information

The "C" in WE CARE stands for "Communicate and Gather Information" and includes four steps:

- Identify customer's needs.
- Gather information/review case comments.
- Complete application/tasks.
- Confirm information.

This is the data collection portion of the interview and can be quite lengthy.
Be sure to check-in regularly with your customer to ensure he or she understands the process.

IF A NEW CASE

- While the customer responds to questions, maintain an empathetic rapport.
- Listen for and try to identify the customer's unstated needs.
- Strive to remain warm and welcoming throughout the data-gathering phase.

IDENTIFY CUSTOMER'S NEEDS

Inquire into:

- The customer's questions, needs, or concerns.
- The steps the customer has taken to maintain or update his or her benefits.

Remain nonjudgmental regarding the action(s) the customer has or has not taken to maintain or update his or her benefits.

CONFIRM PERSONAL INFORMATION

Example language to confirm the customer's personal information:

- *"In order to confirm your identity, can you please provide me with your Social Security Number? "*

Outbound Call for a CalFresh Application

GATHER INFORMATION/REVIEW CASE COMMENTS

Please note: If you experience technical difficulties and need to troubleshoot, finish as much of the interview as possible and then leave the case as pending. (Refer to page 40.)

- Remain warm and welcoming during the data-gathering phase.
- Explain to the customer that your review may take up to 10 minutes.
- Remind the customer that you will ask a series of questions and briefly summarize why you need the information. (For example to check for eligibility, get basic information, etc.) Explain that you will need to type his or her responses into the system.
- Let the customer know what you will be doing prior to reviewing his or her case information and documents:
  - *"It looks as though we received a document/verification from you."*
  - *"Do you mind holding while I review these documents? It may take up to 10 minutes."*

CONFIRM INFORMATION

- Confirm the information with the customer as you go along:
  - BR: *"When is your rent due?"*
  - Customer: *"I pay it around the 5th of the month."*
  - BR: *"To confirm, your rent is paid on the 5th of each month. Is that correct?"*

Complete application/tasks/case updates.

VIDEO

Now we're going to return to the video to show Benefit Rep Barbara interviewing Christina, the college student seeking CalFresh aid.

- Video start time: 22:34
- Pause video

CHECK FOR UNDERSTANDING

- What does "C" represent in the WE CARE model? *Identify customer's needs; gather information/ review case comments; complete application/tasks; confirm information.*
- What was done correctly in this scenario? *(Allow trainees to discuss.)*
- Why is it important to reiterate the answer a customer gives? *Repeating the customer's answers confirms the Benefit Representative correctly heard the customer. It also reinforces that the Benefit Representative understand the customer's needs and it imparts to the customer that the Benefit Representative is listening.*

Outbound Call for a CalFresh Application

ADDRESS CUSTOMER NEEDS

The "A" in WE CARE stands for "Address Customer Needs" and includes three steps:

• Determine possible program eligibility.

• Explain status/timelines/case updates.

• Provide additional options/referrals.

This interaction focuses on addressing all of the needs of the customer, including eligibility, benefit issuance timelines and referrals.

IF A NEW CASE: DETERMINE POSSIBLE PROGRAM ELIGIBILITY

As you review the customer's information for eligibility, keep him or her apprised of your progress.

• *"I think I have everything I need, but let me double check just to be sure."*

• *"I'm almost done. Are you doing OK on time?"*

Explain to the customer that eligibility will be based on individual circumstances when all of the required information is verified.

EXPLAIN STATUS/TIMELINES

Provide the customer with the date by which they need to complete their actions steps. Confirm that the customer understands their next steps:

"We are missing some information needed to process your case."

• Inform the customer of what they are missing.

• Explain that the process cannot move forward without the required document(s).

• Explain how the customer can get the information to the County.

• Let the customer know that the County will send him or her a written checklist of the missing information.

• Confirm with the customer that he or she understands what is being requested and ask if him or her if they have any questions or concerns about the missing documents.

Example language:

• *"I am going to send you a checklist confirming the information you still need to provide us. To avoid discontinuance of benefits, please submit the verification by_____."*

• *"Do you have any questions regarding what documents are needed or how you can get us the information?"*

Provide the customer with HSD's action items including the timeline for which they can expect to get their benefits once all necessary information has been provided:

• CalFresh – 30 days	• Medi-Cal – 45 days
• CalWorks – 45 days	• GA – 45 days

PROVIDE ADDITIONAL OPTIONS/REFERRALS

Verbalize an empathetic understanding that the assistance or the timing of the assistance may not meet the customer's expectations or needs. Ask the customer about how he or she is feeling, and inquire into his or her concerns or questions.

If the customer does not quality for benefits as hoped, ask the customer if you can work with him or her on some alternative solutions:

- *"I am sorry, but you currently do not meet program requirements for* _____ (state the program for which they came in for but are not eligible). *If* _____ (specify what would need to happen to make the customer eligible for the program) *changes please contact us right away so that we can reassess your eligibility for assistance."*

- *"Would it be helpful if we try to identify some alternative ways for you to get* _____*?"*

- *"Would you like me to provide you with the contact information for community resources that may be able to assist you?"*

- *"Please contact 211 for help with* _____ (give the appropriate service). *It is free, confidential, and available 24 hours a day."* (If the conversation is conducted in Spanish, let the customer know that 211 also provides assistance in Spanish.) *"You may also use the 211 web site at 211bayarea.org and choose Santa Cruz."* Let the customer know that the web site will ask a lot of questions.

If the customer needs food assistance provide the Second Harvest Food Bank Hotline number – 831-662-0991, available Monday-Friday 8am-4pm in English and Spanish.

If the customer needs immediate non-emergency medical assistance provide the following information:

- Dominican Hospital Emergency Room: 831-462-7700; 1555 Soquel Drive, Santa Cruz; Online Emergency Room waiting: dominicanhospital.org.

- Watsonville Community Hospital Emergency Room: 831-724-4741; 75 Nielson Street, Watsonville.

VIDEO

Now we're going to return to the video to show Benefit Rep Barbara interviewing Christina, the college student seeking CalFresh aid.

- Video start time: 23:15

- Pause video

CHECK FOR UNDERSTANDING

- What does "A" represent in the WE CARE model? *Determine possible program eligibility; explain status/timelines/case updates; provide additional options/referrals.*

- What was done correctly in this scenario? *(Allow trainees to discuss.)*

- What other resource did the BR provide for food assistance? *Food Hotline*

Outbound Call for a CalFresh Application

Review and resolve questions and concerns

The "R" in WE CARE stands for "Review and Resolve Questions and Concerns" and includes three steps:

- Verify understanding of status and next steps.
- Address questions and concerns.
- Confirm customer's needs have been addressed.

The step ensures attempts have been made to meet all of the customer's needs, and that the customer understands the status of the eligibility for services.

VERIFY UNDERSTANDING OF STATUS AND NEXT STEPS

Verify that the customer understands his or her eligibility for benefits, benefit status, and next steps. State as applicable:

"As we discussed,…"

- *"You are eligible for _____ benefits. We will be providing you with _____ information within _____ days."*
- *"In order to continue processing your benefits, you need to provide us with _____ document(s)."*
- *"To avoid discontinuance of benefits, please turn in the verification by _____."*
- *"I will send you a checklist confirming the information you still need to provide us."*
- *"You will be receiving information in the mail notifying you of any changes in your eligibility."*
- *"Please notify us if there are any changes in your circumstances including your income. Do you have any questions regarding what changes to report?"*

- *"If you have any additional questions, please contact us at 1-888-421-8080 or come to one of our offices. Any of our many Benefit Representatives will be able to assist you."*
- *"I am again sorry that you did not qualify for the assistance you were seeking. However, you now have contact information for _____ (name of agency) who can provide you with _____ (type of assistance)."*
- *"You now have the contact information for _____ (name of agency) who can provide you with _____ (type of assistance) while you wait for your benefits to become active."*

"Do you have any questions regarding your benefit eligibility, next steps, or what to expect from us?"

Outbound Call for a CalFresh Application

ADDRESS QUESTIONS AND CONCERNS

Verify that you have addressed all of the customer's concerns and questions:

- *"Is there anything else I can help you with at this time?"*
- *"Do you have any additional questions or concerns that you would like to discuss?"*

Examples of how you might phrase responses to a customer's questions:

- *"Information on the specific medical services available as part of your insurance plan, such as prescriptions or procedures, need to be addressed directly by your insurance company or plan provider. Would you like me to provide you with the appropriate contact information?"*

  - Central California Alliance for Health (CCAH): 1-800-700-3874
  - Covered CA: 1-800-300-1506

- *"I would be happy to discuss _____ further with you. Program eligibility is determined by factors such as an individual's age, income, and resources. Does that help?"*
- *"I would be happy to help you with _____. Reports completed correctly make the process easier for everyone. Be sure to answer all of the questions. If the answer to any question is 'Yes', please provide supporting documentation. Does that make sense?"*

CONFIRM CUSTOMER'S NEEDS HAVE BEEN ADDRESSED

Verify that all of the customer's needs, concerns, and questions have been addressed. Example language:

- *"Have I answered all of your questions?"*
- *"Is there anything else I can help you with today?"*

VIDEO

Now we're going to return to the video showing Benefit Representative Barbara explain to Christina, the college student seeking CalFresh aid, why she is ineligible for the service.

- Video start time: 24:45
- Pause video

CHECK FOR UNDERSTANDING

- What does "R" represent in the WE CARE model? *Verify understanding of status and next steps; address questions and concerns; confirm customer's needs have been addressed.*
- How did the Benefit Representative address the customer's disappointment in being denied services? *The Benefit Representative acknowledged Christina's frustration, referred her to other services and encouraged her to reapply should her situation change.*
- What was done correctly in this scenario? *(Allow trainees to discuss.)*

Outbound Call for a CalFresh Application

E ND ON A POSITIVE NOTE

The "E" in WE CARE stands for "End on a Positive Note."
It includes two steps:

• Provide information for future HSD contact.

• Thank customer.

Leaving the customer with a good feeling about the interaction creates a positive relationship for future interactions with HSD.

PROVIDE INFORMATION FOR FUTURE HSD CONTACT

"Before we close our conversation, I want to ensure you know how to get in touch with us in the future."

• *"We will be sending you a contact information card in the mail which will have your case number on it for future reference and information on where to reach us."*

Customer Service Centers – Monday-Friday 8am-5pm

• 1020 Emeline Avenue, Santa Cruz

• 18 West Beach Street, Watsonville

Phone: 888-421-8080, Monday-Friday, 7:30am-5:30pm

County web site: santacruzhumanservices.org

My Benefits CalWIN: mybenefitscalwin.org

THANK CUSTOMER

"Thank you for taking the time to talk with me. Enjoy the rest of your day."

VIDEO

Now we're going to watch the end of the video showing Benefit Rep Barbara explain to Christina, the college student seeking CalFresh aid, why she is ineligible for the service.

• Video start time: 25:32

• Pause video

CHECK FOR UNDERSTANDING

• What does "E" represent in the WE CARE model? *Provide information for future HSD contact and thank the customer.*

• What was done correctly in this scenario? *(Allow trainees to discuss.)*

Conclusion

TECHNICAL DIFFICULTIES

If you encounter a technical issue, do not trouble shoot while the customer is waiting. For example, do not have a customer wait if the system is experiencing a long delay in processing or completing a transaction. Complete a paper template as appropriate. Explain to the customer what his or her options are should this event occur:

- *"I apologize, but we are having some technical difficulties at this time."*

- If appropriate: *"We will go through the regular process, however, I will not be able to determine your eligibility for assistance at this time. Once it is working again, I will run your information through our system."*

- *"Someone from my office will give you a call back in no later than three business days to let you know the status of your benefits."*

- If appropriate: *"We unfortunately cannot assist you at this time. You will receive a call back as soon as possible, but no later than three business days."*

- *"What is a good time for us to call you back?"* Schedule a phone interview until time certain callback functionality is in place.

- *"Is _____ (telephone number) the best number to reach you? Does the number you provided me with have voicemail?"*

- If yes, ask: *"Is it OK if I leave you a message on the voicemail?"*

  - Document if the customer gives permission to leave a message on the voicemail.

- *"Please feel free to call us at 1-888-421-8080, Monday-Friday, 7:30am-5:30pm, should you have any questions or concerns."*

- *"Do you have any other questions?"*

- *"Thank you for your time."*

Conclusion

CUSTOMER CARE PRACTICES

These practices emphasize our values of providing customers with a positive, helpful experience.

HORIZONTAL INTEGRATION

The process of initiating assistance across programs to address family needs in a comprehensive manner. For example, when a customer applies for health coverage, also offer CalFresh or CalWORKs benefits.

REFERRALS

Providing referrals to additional services that support the customer's need is a core value of WE CARE. There are instances when a customer's benefits may be delayed or that person may not be eligible for a service or program. Providing accurate referrals creates a bridge between County and community assistance programs, such as referring customers to 211 services or Second Harvest Food Bank.

CASE COMMENTS

In order to achieve a consistent customer experience, it is critical to maintain accurate case comments. This ensures future Benefit Representatives have the information available to provide excellent customer service. Case comments may describe changes to income, family or household composition, or living situations. They also may cover processing actions staff has taken on a case.

RIGHTS AND RESPONSIBILITIES

As part of keeping customers informed and empowered, Benefits Representatives are responsible for giving each customer a clear and thorough explanation of the individual's rights and responsibilities. This ensures that applicants/recipients will be aware of what they need to do to get and keep their benefits.

County of Santa Cruz
HUMAN SERVICES
DEPARTMENT

1000 Emeline Avenue
Santa Cruz, CA 95060