



Desk Reference



County of Santa Cruz
HUMAN SERVICES
DEPARTMENT



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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

Operational Framework

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

- 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.



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 deliver a uniform customer service experience that provides positive customer 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.

What is WE CARE?

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.



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.

TAKEAWAY POINTS

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.

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.

TAKEAWAY POINT

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

- ***“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.”***

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.

TAKEAWAY POINT

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.

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

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.

TAKEAWAY POINT

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

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.

TAKEAWAY POINT

This step ensures attempts have been made to meet all of the customer’s needs and that the customer understands the status of eligibility for benefits.

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?**

End 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.

TAKEAWAY POINT

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

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

Provide the customer an information card with their case number written on it.

Obtain the customer’s consent to use his/her cell phone for auto-call and text reminders.

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.



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Dedicated to
Making a Difference

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