



# Shasta County Health & Human Services Agency

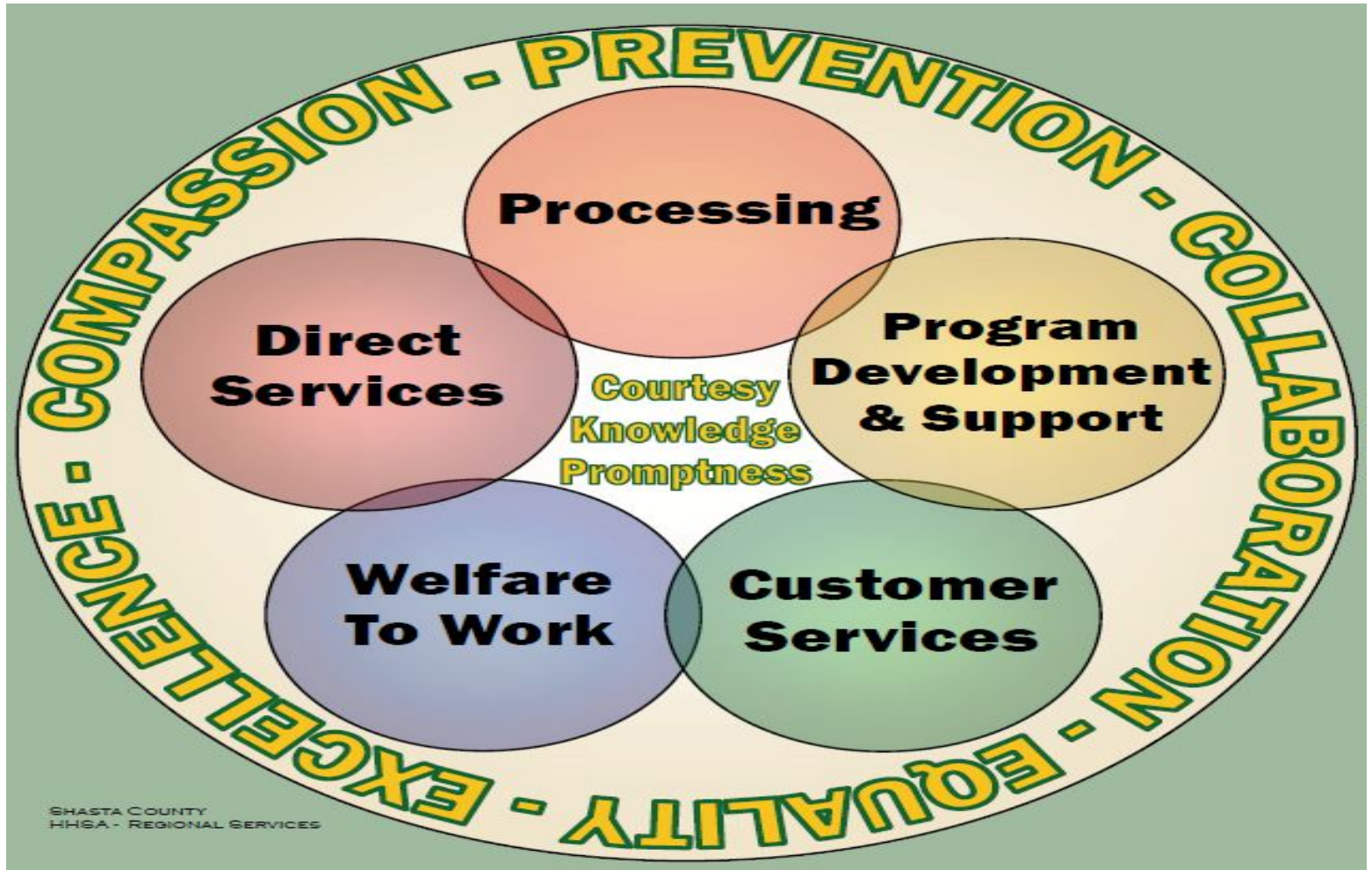
**Data, Dashboards & Decision-Making:  
Making it Work for the Customer**

# Shasta County Statistics

- Population of County 178,980
- More than 1 in 4 Shasta County Residents ARE HELPED with Public Benefits
  - Current Case Load Size
    - CalWORKs – 2,987
    - CalFresh -12,627
    - Medi-Cal – 23, 863
    - General Assistance – 427



# Health & Human Services Agency Regional Services Branch Eligibility & Employment



# Processing Division

## Task Based Case Management

- Processing Division
  - Supervisors – 9, Eligibility Worker III -15, Eligibility Worker I/II - 36 to 54
  - Implemented October 1, 2012.
    - Cases assigned to Master Assignment Queues (MAQs). MAQ assignment was based on beginning letter of last name and CalFresh Renewal Date.
    - 24 MAQs held all Medi-Cal/CalFresh cases.
  - Work divided by Function.
    - Reports (Semi Annual Reports (SAR7s), Transitional Medi-Cal (TMC), etc)
    - Renewals
    - Miscellaneous (Income Eligibility Verification System (IEVS), add person/programs applications, mid-period changes, tasks, Medi-Cal Eligibility Data System (MEDS) alerts, etc).





# Processing Division Unit Task Based Case Management

- Implemented July 1, 2013
  - Cases divided into individual Unit MAQs
- Each unit has 6 MAQs.
  - 4 Processing MAQs
  - 1 Review MAQ
  - 1 Confidential MAQ
- Unit is responsible for all aspects of case processing. Supervisor assigns and tracks work utilizing Reports.

# Reports and Workload Assignment

- Bi-Monthly All Program Renewal (RE) List
  - Identifies REs due for current month, prior month and up to 2 months future.
- Medi-Cal (MC) Pending Program and Add-A-Person Applications
  - Lists cases with a pending MC Programs and active MC with a pending person



# Reports and Workload Assignment

- Monthly Productivity
  - Tracks the receipt and completion of the Semi Annual Report (SAR) 7s, Transitional Medi-Cal (TMC)176S, RE Packets.
  - Report is used assign and track completion of SAR7s, TMC 176 reports and MC REs daily.
- Periodic Report SAR7s Restoration of Aid (ROA)
  - List all CalWORKS/CalFresh programs discontinued in current month for Incomplete or Not Received SAR7 and subsequently the county has received a SAR7.
  - Report is used to assign and track completion of SAR7s received on closed cases daily.

# Productivity Report – Ad Hoc

- Tasks

- Lists Tasks in a open status as of end of business the previous day to assign and track completion of tasks daily.

- Uses 29 Types of Tasks from the Approved Task List

- MEDS Alerts – Uncompleted

- Report displays uncompleted MEDS Alerts assigned to the Processing Division
- The report is sorted by MEDS ALERT ID Number and date to assign MEDS alerts to workers weekly.

126		
127	11 - Processing	
128		
129		Total
130	Cheshier, Bob	187
131	Ciucci, Janet	139
132	Doe, Sheraine	115
133	Hope, Julieanne	136
134	Merritt, Melissa	170
135	Randall, Brenda	620
136	Schreiber, Stephanie	410
137	Swanson, Leticia	134
138	Total	1,911
139		





# Processing Division

## Data Workgroup (PDDW)

- Created a workgroup comprised of County Data Workgroup Chair, Program Manager, Eligibility Supervisor, Eligibility Worker III, Eligibility Worker 1/11 and an Office Assistant.
- Meet weekly to:
  - Create the Productivity Data Report and Dashboard
  - Review data report and check for discrepancies
  - Complete Random Sampling to assure data report is correct
  - Complete Data Variance Reviews
  - Develop Methods to acknowledge progress



# Productivity Data Report

- The purpose of this report is to track workload and improvements made by the Processing Division using the data collected.
- This report lists by workers what was completed during the month.
  - Supervisors gather the data from each worker assignment sheet and from Business Object reports
  - Report used to acknowledge high/low performers, identify some best practices, trends, data used to set division priorities and staffing needs.

# Data Variance Reviews



- Met with Supervisors to determine how they were tracking and counting numbers on the Productivity report
- Developed consistent definitions to define work processed for each function.
- Definitions example:
  - Reports Processed – TMC 176 and/or SAR7 report status has been updated in customer reporting, EDBC has been accepted for the appropriate month, if applicable; appropriate Notice of Action sent.

# Productivity Data Report – Barriers to Implementation

- Units were utilizing different methods of assigning and tracking work.
- Tracking based on Ad Hoc reports from C-IV does not account for re-work of cases due to Incomplete SAR7s, CalFresh Phone Interviews follow-up, etc.



# Productivity Data Report

A	B	J	K	L	M	N	O	P	Q	R	S	T
1	<b>CW RE</b>	<b>YTD</b>	<b>May</b>	<b>June</b>	<b>July</b>	<b>August</b>	<b>September</b>	<b>October</b>	<b>November</b>	<b>December</b>		
2	# Packets Sent	906	219	255	230	202	0	0	0	0		
3	# Packets Received	498	160	172	166	0	0	0	0	0		
4	# Packets Incomplete	16	0	9	7	0	0	0	0	0		
5	# RE's Received	217	121	0	96	0	0	0	0	0		
6	# RE's Completed total	303	0	155	148	0	0	0	0	0		
7	# RE's Received but not complete as of month end (Received or Reviewed – Ready to run EDBC)***	28	0	17	11	0	0	0	0	0		
8	<b>TCF</b>	<b>YTD</b>	<b>May</b>	<b>June</b>	<b>July</b>	<b>August</b>	<b>September</b>	<b>October</b>	<b>November</b>	<b>December</b>		
9	# TCF Processed	460	155	136	169	0	0	0	0	0		
10	<b>CF RE</b>	<b>YTD</b>	<b>May</b>	<b>June</b>	<b>July</b>	<b>August</b>	<b>September</b>	<b>October</b>	<b>November</b>	<b>December</b>		
11	RE Previous Months Pending	37	37									
12	# Packets Sent	2356	546	824	774	103	109	0	0	0		
13	Total RE Pending (Remaining + Current Month)	2216	583	857	776	0	0	0	0	0		
14	# Packets Received	855	366	489	0	0	0	0	0	0		
15	# Packets Incomplete	111	33	78	0	0	0	0	0	0		
16	# RE's Assigned	0										
17	# RE's Processed	4106	1179	1404	1523	0	0	0	0	0		
18	# RE's Received but Incomplete as of month end (Received or Reviewed – Ready to run EDBC)***	0										
19	<b>MC RE</b>	<b>YTD</b>	<b>May</b>	<b>June</b>	<b>July</b>	<b>August</b>	<b>September</b>	<b>October</b>	<b>November</b>	<b>December</b>		
20	RE Previous Months Pending	2	2	0	0	0	0	0	0	0		
21	# Packets Sent	102	50	52	0	0	0	0	0	0		
22	Total RE Pending (Remaining + Current Month)	52	52	0	0	0	0	0	0	0		
23	# Packets Received	94	48	46	0	0	0	0	0	0		
24	# Packets Incomplete	2	2	0	0	0	0	0	0	0		
25	# RE's Received	43	0	43	0	0	0	0	0	0		
26	# RE's Completed	43	0	43	0	0	0	0	0	0		
27	# RE's Assigned	0										
28	# RE's Processed	1086	232	289	565	0	0	0	0	0		
29	# REs Received but Incomplete as of month end(Received or Reviewed – Ready to run EDBC)***	0										
30	<b>Reports (TMC176 and SAR7)</b>	<b>YTD</b>	<b>May</b>	<b>June</b>	<b>July</b>	<b>August</b>	<b>September</b>	<b>October</b>	<b>November</b>	<b>December</b>		
31	TMC176/SAR7 sent	3926	910	1103	817	1096	0	0	0	0		
32	TMC176/SAR7 received by Board deadline	1556	533	608	415	0	0	0	0	0		
33	TMC176/SAR7 processed by Board deadline	1556	533	608	415	0	0	0	0	0		
34	Reports assigned*	3057	996	1089	917	9	10	11	12	13		
35	Reports processed*	3037	1016	1097	924	0	0	0	0	0		
36	Reports remaining*	20	-20	-8	-7	9	10	11	12	13		

# Productivity Data Report

Percentage of work completed and Percentage of hours worked by unit

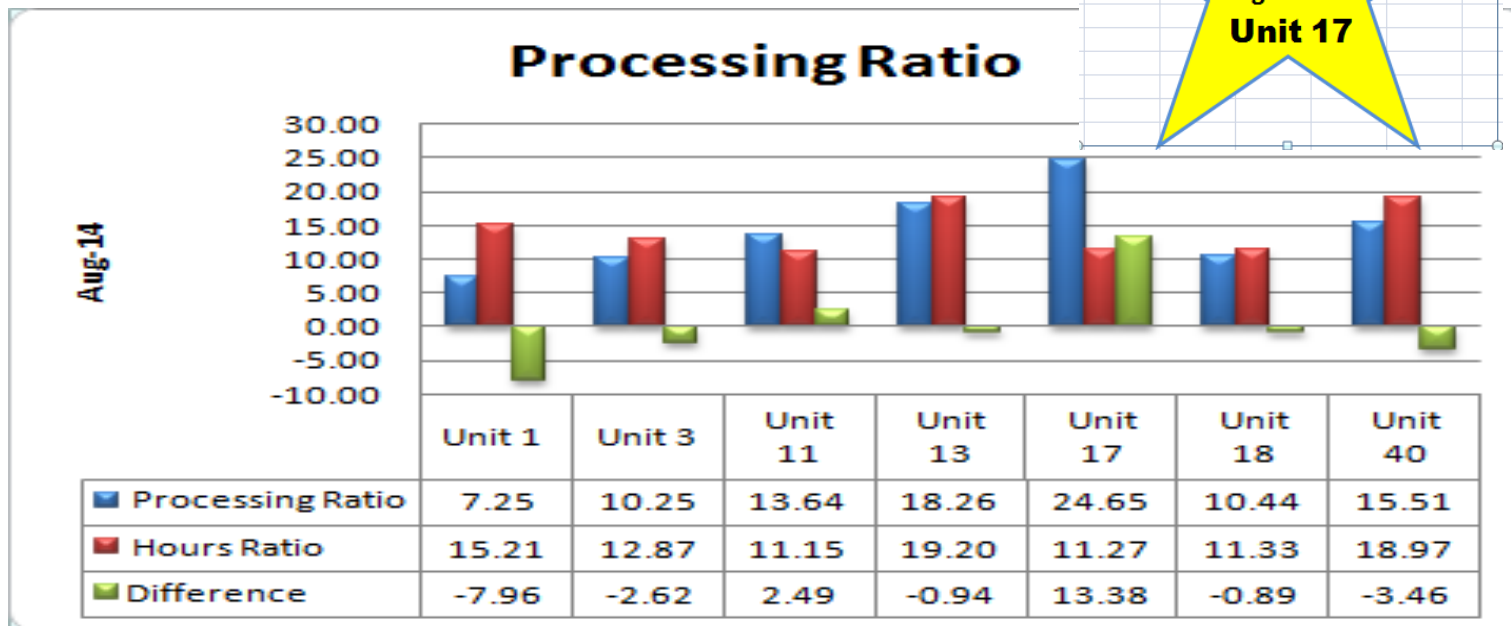
Processing Numbers	YTD	May	June	July	August	September	October	November	December
Unit 1	4589	1064	2188	1337					
Unit 3	4031	1107	1284	1640					
Unit 11	4834	1938	1307	1589					
Unit 13	10064	3612	3353	3153					
Unit 17	6645	2340	2296	2009					
Unit 18	2872	565	1228	1079					
Unit 40	7149	3130	1426	2593					
Total:	40184	13756	13082	13400					
Processing Ratio	YTD	May	June	July	August	September	October	November	December
Unit 1	11.42%	7.73%	16.73%	9.98%					
Unit 3	10.03%	8.05%	9.82%	12.24%					
Unit 11	12.03%	14.09%	9.99%	11.86%					
Unit 13	25.04%	26.26%	25.63%	23.53%					
Unit 17	16.54%	17.01%	17.55%	14.99%					
Unit 18	7.15%	4.11%	9.39%	8.05%					
Unit 40	17.79%	22.75%	10.90%	19.35%					
Total (100%):	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Hours Ratio	YTD	May	June	July	August	September	October	November	December
Unit 1	11.84%	12.19%	11.85%	11.48%					
Unit 3	17.22%	16.96%	17.46%	17.26%					
Unit 11	12.68%	13.98%	12.71%	11.27%					
Unit 13	19.85%	18.36%	20.16%	21.14%					
Unit 17	11.31%	10.32%	12.07%	11.62%					
Unit 18	12.60%	14.74%	12.02%	10.89%					
Unit 40	14.50%	13.46%	13.72%	16.34%					
Total (100%):	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%



# Processing Division Data

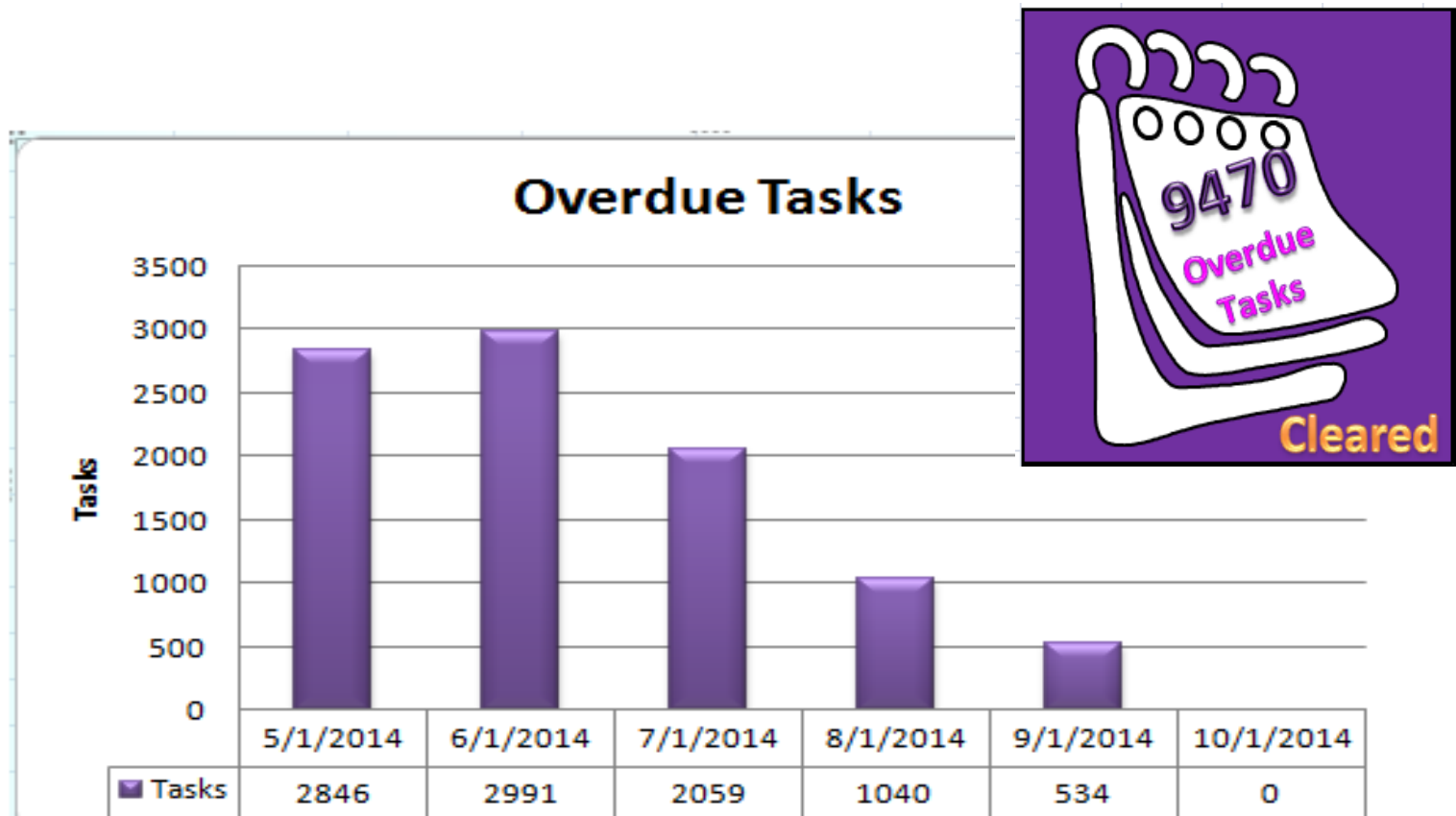
## Dashboard Processing Ratio

- Productivity Rate
  - Percentage of Hours Worked
  - Percent of Processed Work

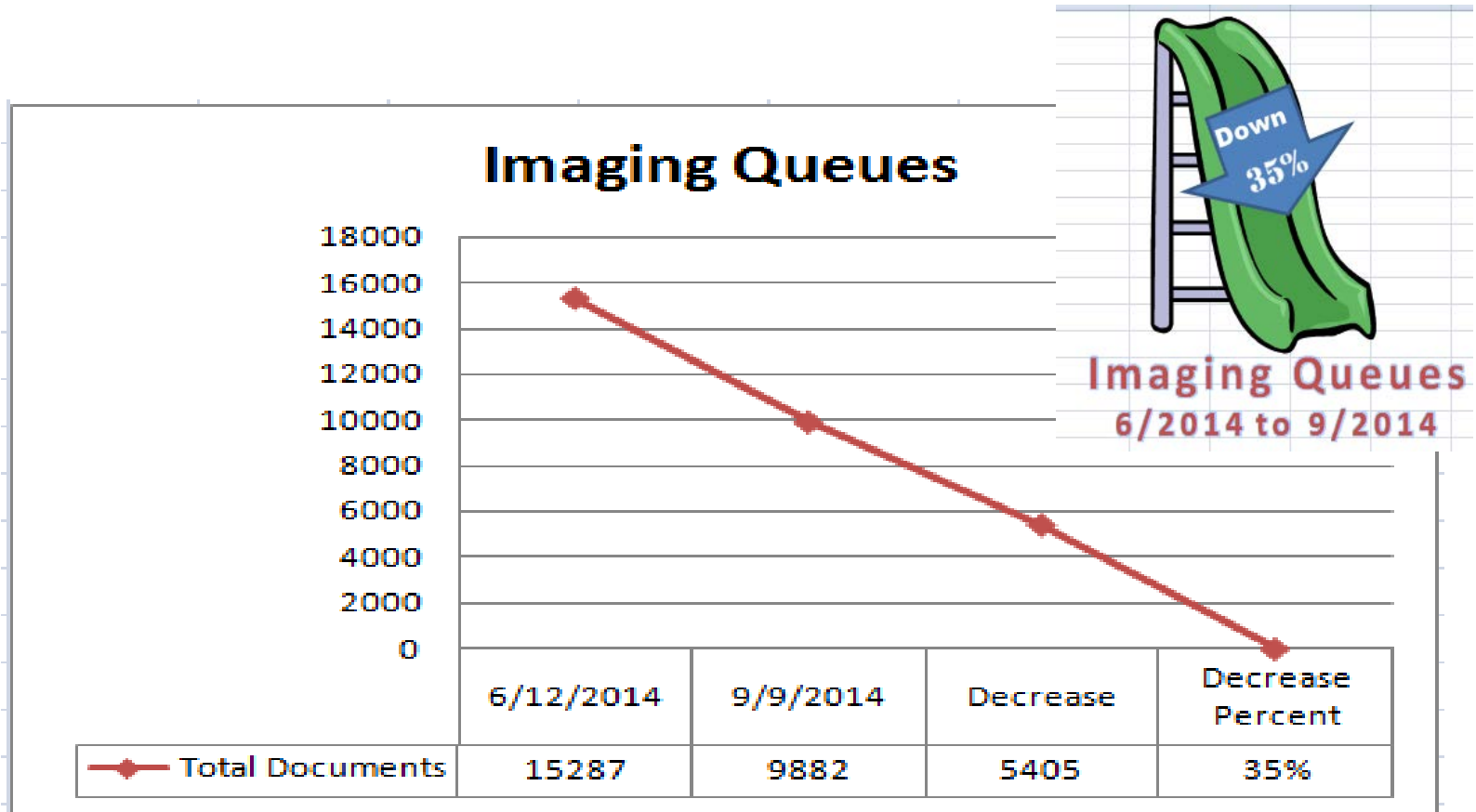


# Processing Division Data Dashboard Overdue Tasks

- Tracking started May 2014

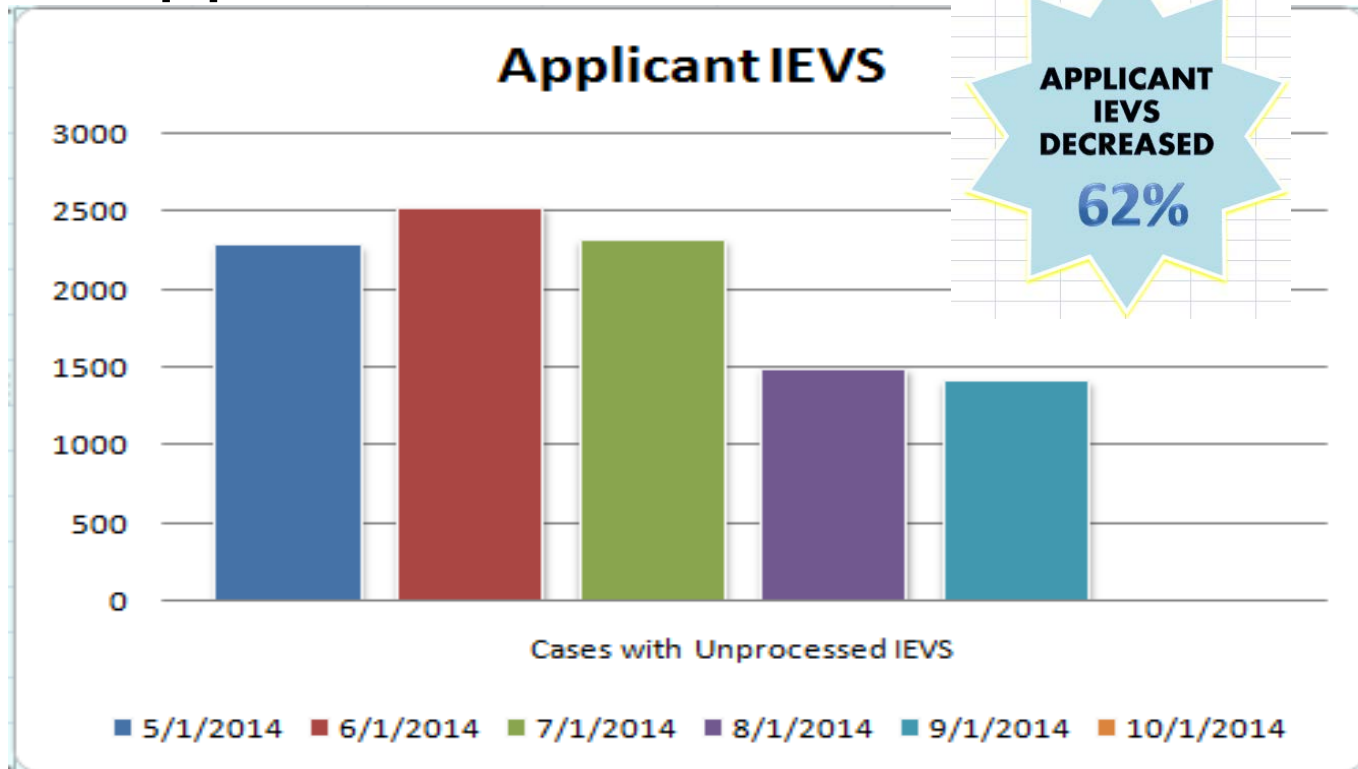


# Processing Division Data Dashboard Imaging Queues



# Processing Division Data Dashboard Income Eligibility Verifications System (IEVS)

- Applicant IEVS



# Best Practices



- Met with supervisors determine Best Practices in units with high productivity.
  - Imaging Queues – Routinely Rotating Assignment of the Unit Imaging Queues to workers to assure all documents are processed timely
  - CalFresh Interview Preparation
  - CalFresh Interviewing
  - Random Sampling – Routing Documents



# Other Changes

- Kiosks
- Lean Six Sigma Processes
- Service Improvement Team
  - Quality Assurance Workgroup
  - Business Process & Re-Engineering
  - Data
    - Dashboard Data



# Contact Info

Laura Scott, Program Manager  
Shasta County Health and Human Services  
Agency

Regional Services-Eligibility & Employment  
Services

Voice: (530) 225-5387 Fax: (530) 225-5288

2460 Breslauer Way Redding, Ca 96001

[lmScott@co.shasta.ca.us](mailto:lmScott@co.shasta.ca.us)