Enhancing the Customer Experience through Technology

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C-IV Customer Service Centers

C-IV has 11 continuing Customer Service Centers (CSC): Butte, Humboldt, Kern, Kings, Monterey, Riverside, San Bernardino, Shasta, Stanislaus, Sutter, Yuba.

Each C-IV CSC has a customized Interactive Voice Response (IVR) flow based on their county processes.

The first C-IV CSC went live on **August 5, 2011 in San Bernardino County**.

San Bernardino County's initial goal for the CSC was to implement a centralized solution to provide services for customers receiving California Work Opportunity and Responsibility to Kids (CalWORKs), CalFresh, and Health Care Programs (HCP).

San Bernardino County continues to expand the customer experience in their CSC using new technology in customer handling and options.
CSC Enhancements

Interactive Voice Response (IVR) enhancements were developed by San Bernardino County and C-IV to solve challenges encountered by the CSC.

The following technology enhancements have improved service to our customers:

- Customer Post Call Survey
- Visual-IVR
- Courtesy Call Back
- Voice Authentication
- **Predictive Handling**
  - EBT Handling
  - Appointment Rescheduling
  - Professional Voice Talent
  - Expanded authentication (SSN and DOB)
Predictive Handling (PH)

**IVR:** “Hi, I see you have an upcoming appointment. If that is what you’re calling about today please press 1.”

**Caller:** Presses 1

- Encourages the use of self service by anticipating requests
- Prevents up-front agent requests and disengaged callers

**What it is!**

An up-front, personalized experience, predicting the call reason based on knowledge of the caller.

**How it helps**

Fosters users confidence in the system, leading to Increased use of self service.

Reduce sole operator/agent requests.

Shorter, more efficient calls.

Higher caller satisfaction.
Using the caller’s information, the IVR will check the phone number the person is calling from to match with a Primary Applicant/Recipient in the C-IV System. If a match is found, the IVR system will:

- Review current case information,
- Determine the most likely reason for the call, based on case information, within a 37 day window, and
- Select one of the options below to ask the customer:
  - Upcoming appointment,
  - Missed or prior appointment,
  - Re-Evaluation (RE) packet,
  - Denial or discontinuance of benefits,
  - Reduction in benefits,
  - Change/approval of benefits, or
  - Calling to report a change to case information.
PH: How it Works!

The question provided to customer is determined based on priority. The top priority is first given to upcoming scheduled appointments.

For example: If a customer has an appointment scheduled within the 37 day timeframe. They will be asked: “Are you calling about your upcoming appointment?”

If a customer does not have an appointment scheduled the logic looks at all the events taking place within the same time range:

The next priority is given to those case events resulting in a loss of benefits.

The Customer is only asked one question, regardless of the activity on the case.

- If they answer No to the question, they are moved to the next menu in the IVR
- If they answer Yes to the question, the call is routed based on the option. This might result in being sent to a self-service option or to a speak to worker queue.
Predictive Handling benefits customers by reducing wait times. The customer is provided various self-service options rather than waiting in a queue to speak to a worker.

New self-service options include:

- Requesting a replacement Electronic Benefit Transfer (EBT) card, and
- Confirming, canceling, or rescheduling an appointment.
In 2015 C-IV and San Bernardino County completed a caller intent campaign to determine why customers were calling. The campaign revealed that approximately 4% of callers in the study were calling regarding their EBT card. Based on these results it was determined that providing a self-service option to request an EBT card would both improve the customer experience and increase processing efficiency for the county.
Self Service Options: Appointments

The same caller intent campaign found approximately 7% of callers were calling regarding canceling, confirming or rescheduling an upcoming appointment.

Appointment Assumptions
- Reschedule option NOT available 10-days before end of month through the Self-Service IVR
- Only for authenticated callers
- Only for current month

- Leverage existing Cancel / Confirm appointment functionality in the current IVR outbound campaign
- No change in current appointment duration
- Caller will be asked to confirm change
- Caller will be given reminder message of possible benefits impact to missing the appointment
- Journal entry created
Professional Voice Talent transforms the way we currently communicate with the caller.

**Text-To-Speech (TTS)**

**Unique**
- Is a type of speech synthesis application that is used to create a spoken sound version of the text in a computer document.
- Flexibility to create TTS fairly quickly.
- Ability to record in multiple languages within the same architecture.

**Commonalities**
- Verbiage
- Languages
- Position where audio is played

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**Professional Voice Talent**

**Unique**
- Auditions of a Voice Talent are performed and one is chosen.
- Caller is able to hear a real voice on the other end of the line.
- Creates audio files that are played to the caller.
- Voice Talent selected is bilingual (English and Spanish).
Expanded Authentication

Authentication allows the customer to access all self-service options through the IVR. Authentication also assists the agent/worker as it allows them to quickly identify the caller and the C-IV System will auto-pop the Case Summary for easy case management. User now has 3 methods to authenticate in the IVR.

Completing Authentication
- Increases Self-Service
- Lowers Average Handle Time (AHT)
- Drives Innovation

Methods to authenticate:
- Voice
- Case & PIN
- SSN & DoB
Expanded Authentication

Case and PIN

- Original Authentication method.
- PINs are issued from the C-IV System and mailed to customer.

Voice

- Customer enrolls in this authentication method.
- Uses natural voice patterns, no PINs, passwords, and repetitive questions
  - A Caller’s voice is analyzed for hundreds of unique characteristics that are then compared to the voice model created
  - “My voice is my password please authenticate me”

Date of Birth and Social Security Number

- Allows customers to use their Date of Birth and Social Security Number to authenticate
- If customer is associated to multiple cases, case number is also required.
Lessons Learned

• Callers have multiple reasons to call
• Callers may not understand the presented option
• Callers may be calling to enroll into an additional program
• Repeated callers will hear the same prediction unless a new event occurs between the calls
• EBT
  – Callers may choose this option to bypass IVR and speak to agent/worker.
  – Need to adjust call flow to ask for program information and clarify requested zip code.
• Authentication: More outreach is needed to ensure Customers understand the advantages of authentication.
Thank you!

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MyBenefits CalWIN

MyBenefits CalWIN Portal Action Solution

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Date Published 8/24/2017
Inspiration and Project Inception

Sacramento County Vision
Sacramento County Department of Human Assistance (DHA) had a vision to:
• To provide the best and most innovative customer-centric service experience
• Achieve the highest level of positive customer outcomes
• Create the most productive work environment of any county public assistance or employment agency in California

Sacramento County’s Goal
• Provide customers the tools and services needed to improve self-sufficiency outcomes by streamlining requests for assistance programs
• Provide customers the ability to:
  • Communicate quickly and effectively using MyBenefits CalWIN
  • Complete tasks in minutes instead of weeks
  • Complete tasks without coming into the office
Business Challenge

How Do We Improve Self Sufficiency Outcomes?

Initial Focus: Reduce the delay to grant eligibility

- Leverage the flexibility of phone applications or other interview methods to apply for, or renew, public assistance benefits

- Break away from the confines of traditional methods of completing the eligibility process
  - Limit the activities around printing and mailing documents (e.g. imaging)
  - The County relied on the US Postal Service or asked customers to come to an office to submit verifications or provide signatures
Change Process and Collaboration

Thought Leadership In Designing Solutions for the CalWIN Eco-System

The Consortium Counties working together to help shape requirements and direction

Conducted **Workgroup** sessions with county staff to identify improvement opportunities

**Collaboration** with the CalWIN Consortium to gain additional County experience and insight

Set **direction** to ensure the solution can be adopted by other Counties

**CalWIN Consortium**

- Alameda
- Contra Costa
- Fresno
- Orange
- Placer
- Sacramento
- San Diego
- San Francisco
- San Luis Obispo
- San Mateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Ventura
- Yolo

11/29/2017
CalWIN Discovery and Innovation

Customers Want Access To Services Available In Other Sectors Of Life Today

- Provide capabilities for customers to streamline requests for assistance programs
- Offer the ability to communicate quickly and effectively, in minutes instead of weeks
- Allow customers to complete their tasks, whenever and wherever they choose

- Allow staff to upload the Statement of Facts for online signature
- Ability to send information to the customer
- Ability to request information from the customer
- Ability for staff to create Case Actions for Customers to complete within MyBCW
CalWIN Case Action Solution

Ability To Communicate Quickly And Effectively With Customers
The Case Action Solution provides the county and customers the ability to easily navigate to receive and deliver personal information required to determine benefit eligibility.

- Flexible design to accommodate almost all customer scenarios
- Allow staff to request customers to receive and submit documents, or electronically sign documents instantly.
- Enables a much more customer-focused way of doing business
- Electronic document processing improves the business activities needed around document mailing, handling, imaging, and indexing.
Signature Action
MyBenefits CalWIN Action Solution

CalWIN Actions Overview

In CalWIN the **Search for Case Actions** page can be accessed from the navigator within **General System**.
MyBenefits CalWIN Action Solution

CalWIN Search for Case Actions

First step is to search on the **Case#** and review the existing Actions prior to **Add** a new Action.

### Search for Case Actions

![Screenshot of CalWIN search interface]

- **Case #:** 1B11Y35
- **Action #:**
- **Effective Begin Date:** 08/01/2017
- **Action Type:** Request Information fr Closed
- **Status:** 08/01/2017
- **Due Date:** 08/01/2017
- **Program:** Food Stamps

**Date Range:**
- From: 07/28/2017
- To: 08/28/2017
MyBenefits CalWIN Action Solution

Create a Signature Action
Eligibility worker can select the appropriate Action to send Information to Client, Request Information from Client, or Signature Needed.

Maintain Case Actions

[Image of Maintain Case Actions form]

Email Notification
Case Email Address: Rylan.Genn@calwin.org - Receive Email [Y/N]: Yes - Queue Email

Received Documents... Progress Details...
MyBenefits CalWIN Action Solution

Create Case Action
For this scenario we are creating a “Signature Needed” Action for our test case, Blake. The worker completed the required fields (*) and clicked save.

Maintain Case Actions
Add Documents to the Action

For this test case we will add a Statement of Facts and the CF 285 Rights and Responsibilities for Blake to review and sign. We have the option to select pre-loaded (blank) documents, upload a file, or CalWIN generated correspondence. The worker has the option to send the customer a reminder email.
MyBenefits CalWIN Action Solution

MyBCW Benefits Overview
The Action is instantly available in MyBCW. The next time Blake logs in the Overview page will provide an Alert to the number of open Actions available on his Case(s).

![MyBenefits Overview](image)

Welcome to MyBenefits CalWIN Overview. This page has information about your benefits, such as program status. The View Details button will show you more access to benefit amounts and history, reporting/renewal status, and how to contact a county representative.

**Blake M - Benefit Overview**

<table>
<thead>
<tr>
<th>Program</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CalWORKS</td>
<td>Approved</td>
<td>[View Details]</td>
</tr>
<tr>
<td>CalFresh</td>
<td>Approved</td>
<td>[View Details]</td>
</tr>
<tr>
<td>Medi-Cal/CMSP</td>
<td>Approved</td>
<td>[View Details]</td>
</tr>
</tbody>
</table>
MyBenefits CalWIN Action Solution

MyBCW Actions Inbox
The Action Inbox page displays the open Actions available on the customer’s Case(s).
MyBenefits CalWIN Action Solution

MyBCW Actions Details Page

The Action Details page will navigate the customer through a workflow to complete the Action. The detail page provides details of the Action and the instructions needed for the customer to complete the Action.

![Image of MyBenefits CalWIN Action Details Page]

- This action needs to be completed by 08/30/2017.
- A signature is needed on CF 285 for Mead, Blake J.
- History exists for this action
- If you have a disability or need help with this action, let the County Welfare Department (County) know and someone will help you.
- This action was created on 08/28/2017 and due on 08/30/2017.

[Start button]
MyBenefits CalWIN Action Solution

MyBCW Signature Workflow
We begin the workflow with the Rights and Responsibilities page, which is based on the document type selected for this Action.
MyBenefits CalWIN Action Solution

MyBCW Signature Workflow

Next the customer is able to review and sign the document added to the Action. The user has multiple options to sign, decline to electronically sign, or identify reasons why they cannot sign.
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MyBCW Signature Workflow
The customer’s final step is to validate the signature page appended to the original document prior to completing their Action.
The customer receives a confirmation number and has the ability print a copy of the submitted document.
MyBenefits CalWIN Action Solution

CalWIN Search for Case Actions

CalWIN is instantly updated with the status of the Action, Client Submitted.
MyBenefits CalWIN Action Solution

CalWIN Action Details

The County is able to review the document submitted by the customer.

Maintain Case Actions

The County is able to review the document submitted by the customer.
MyBenefits CalWIN Action Solution

CalWIN Actions Documents List

The Imaged Documents List allows the county to view all of the documents submitted by the customer.

<table>
<thead>
<tr>
<th>Documents</th>
<th>Data Submitted</th>
<th>Document Type</th>
<th>Person</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>signature_signed.pdf</td>
<td>08/29/2017</td>
<td>SAWS 2 PLUS</td>
<td>Blake Mead</td>
<td>Individual</td>
</tr>
</tbody>
</table>

Rows Selected: 1

1 Displayed Rows. No More Rows.

Download... View
The County confirmed Blake completed the Action and will now update the Status to Closed.

The progress has been tracked and can be reviewed.
MyBenefits CalWIN Action Solution

MyBCW Actions Details
The customer also has access to review the progress of the action.

You completed this action on 08/28/2017.
Thank you for providing the requested information for Mead, Blake J. No further action is necessary.

History exists for this action View less details

Details

Date Description
08/28/2017 You completed this action
08/28/2017 You submitted this action
08/28/2017 You viewed this action
08/28/2017 Action was created

Here are the items that you have submitted for this action:

Action # Description
signature_signed.pdf SAWS 2 PLUS uploaded on 08/29/2017 for Blake Mead. Please contact the County if you need a copy of this form.

If you have a disability or need help with this action, let the County Welfare Department (County) know and someone will help you.

This action was created on 08/28/2017 and due on 08/30/2017

Back
Request Information from Client
MyBenefits CalWIN Action Solution

CalWIN Request Information from Client Action

In this scenario the county will create a “Request Information from Client” Action for a utility bill.
MyBenefits CalWIN Action Solution

CalWIN Request Information from Client Action

In this example the County will also add an additional document for the customer to review.
MyBenefits CalWIN Action Solution

CalWIN Request Information from Client Action
The worker will complete the required fields and attach the document.
MyBenefits CalWIN Action Solution

MyBCW Actions Overview
The customer’s MyBCW Overview and Action Inbox pages are instantly updated with new Action.

11/29/2017
MyBenefits CalWIN Action Solution

Actions Overview

The Action Details page will provide instructions to complete the Action and also display the Documents to Review section. Selecting Start will navigate the customer through the steps to upload the document.

This action needs to be completed by 08/31/2017.

We need some information from you. Please review the instructions below.

Instructions: Please send us a copy of your utility bill

History exists for this action View Details 

If you have a disability or need help with this action, let the County Welfare Department (County) know and someone will help you.

This action was created on 08/28/2017 and due on 08/31/2017

Documents to review

Here are the documents from the county to assist you with this action.

AR 3 Mid Year Status Report

Here is the AR3 form we discussed
MyBenefits CalWIN Action Solution

CalWIN Action Status

When the customer **views** an Action in MyBCW the system will instantly update the status in CalWIN.
MyBenefits CalWIN Action Solution

MyBCW Upload Documents Workflow

The Submit Documents Detail page allows the customer to upload document(s) requested by the County.

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The customer receives a confirmation number and has the ability print a copy of the submitted document.
MyBenefits CalWIN Action Solution

CalWIN Search for Case Actions
CalWIN is instantly updated with the status of the Action, Client Submitted.

<table>
<thead>
<tr>
<th>Case Id</th>
<th>Action #</th>
<th>Effective Begin Date</th>
<th>Action Type</th>
<th>Status</th>
<th>Status Date</th>
<th>Due Date</th>
<th>Individual</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>1B11Y35</td>
<td>10014</td>
<td>08/28/2017</td>
<td>Request Information fr Client Submitted</td>
<td>08/28/2017</td>
<td>08/31/2017</td>
<td></td>
<td></td>
<td>Food Stamps</td>
</tr>
<tr>
<td>1B11Y35</td>
<td>10013</td>
<td>08/28/2017</td>
<td>Signature Needed</td>
<td>Closed</td>
<td>08/28/2017</td>
<td>06/30/2017</td>
<td>Mead, Blake J</td>
<td>Food Stamps</td>
</tr>
<tr>
<td>1B11Y35</td>
<td>10012</td>
<td>08/01/2017</td>
<td>Request Information fr Closed</td>
<td></td>
<td>08/01/2017</td>
<td>08/01/2017</td>
<td></td>
<td>Food Stamps</td>
</tr>
</tbody>
</table>
MyBenefits CalWIN Action Solution

CalWIN Actions Documents List

The Imaged Documents List allows the county to view all of the documents submitted by the customer.
MyBenefits CalWIN Action Solution

CalWIN Actions Details

The County confirmed Blake completed the Action and will now update the Action Status to Closed.
Lessons Learned
Case Action Implementation

Build the Foundation for a Successful Launch
During the project development process, DHA focused on educating both staff and customers on the features and benefits of the MyBenefits CalWIN Portal
- Bureau Champions
- Training Tools and Job Aids
- Marketing to Customers

Create a Robust, Long-Term Training Strategy
- Know your audience (the “techies”, the hands-on learners, the sceptics)
- Variety of training materials and methods

Available to all CalWIN Counties in training and production
Solution Impact

Keep At It! Celebrate the Successes

• While time savings is of great importance, it does not fully describe the true impact to the customer of being able to complete their county business without leaving their home, or without having to use the few spare dollars they have to buy a bus ticket to and from the office to complete paperwork.

• Positive Impact

   Case Comment:
   “5/3/17 2:56pm- Customer called stating her daughter has a doctor’s appointment today at 3pm but her Medi-Cal is discontinued for no payment of premium. She expressed frustration with the process of restoring eligibility. Stated she did make the payment and has called to check on payment verification several times. The doctor’s office wants $191 up front if the issue isn’t resolved in time. She has been waiting for 6 months for the appointment and doesn’t have the money to pay up front. Sent customer a Case Action for her to attach verification of payment. Customer submitted proof through MyBCW. Made correction, re-evaluated benefits, authorized Medi-Cal. Submitted transaction to MEDS so child can be seen by doctor immediately. Customer was very appreciative.”

   Email from worker:
   “Hello. I thought you’d want to know I used the Case Action on Friday afternoon to send a customer their incomplete change report. They were able to complete the missing questions and send it back to me during the phone call, and I was able to process it right away and restore their benefits so they could buy groceries. They wouldn’t have had any food over the weekend without it.”
Success Measures

Measureable Analytics

• The majority of Actions being processed are the Signature type, with those more than doubling from April to May 2017.

• In May 2017, 57% of the Actions sent for Signature were successfully submitted. Out of these submissions, 55% were submitted the very same day, 88% were submitted within six days or less, and 90% were submitted before the end of the month resulting in no delay of benefits.

  • February - 32% increase from January
  • March - 78% increase from January
  • April - 62% increase from January
  • May - 252% increase from January (over 100% increase from April to May).

• Over 1600 Case Actions sent in August 2017 – 600% increase from May to August
Thank you

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Questions and Discussion