

Cabarrus County Provides Superior Service with Modernized Lobby

Cabarrus County Department of Human Services' (DHS) clients were frustrated by a confusing lobby and long waits, which had a ripple effect on the agency's efficiency. Cabarrus County DHS partnered with Northwoods to redesign the lobby, upgrade technology, and modernize business processes to reduce client and caseworker frustration and process applications for services much faster.



Cabarrus County DHS was performing well until the economic downturn hit. From 2008 to 2013, Cabarrus County residents eligible for Medicaid increased by 33%. Residents eligible for Food & Nutrition Services increased by 62%.

The agency also faced many of the same pressures that agencies across North Carolina and the country face:

- An influx of clients seeking Medicaid through the Affordable Care Act
- Adjusting to the new case management system, NC FAST, which initially created a backlog as workers learned to enter applications and recertifications
- High caseloads during traditionally busy times including Thanksgiving, the end of school, and crisis and energy assistance seasons

The agency worked hard to keep up with the volume of clients, but inadvertently neglected to keep existing business processes and technology – Northwoods' client and lobby management software, Compass® Appointments – updated. Operating in crisis mode, the agency reverted to manual processes that only exacerbated the problem in the lobby and throughout the agency:

- Confusing lobby flow for clients
- Client frustration because of long wait times
- Caseworker stress trying to process cases quickly
- Caseworker frustration with inequitable work distribution
- Management inability to track why and how many clients are in the lobby



What Went Wrong?

Rather than using the software as designed to electronically track client appointments and walk-ins, caseworkers reverted to using spreadsheets and tick sheets.

To manage the overloaded lobby, the agency added a DMV-esque ticketing system requiring every client to take a ticket and see a front desk worker whether the client was there for a scheduled appointment, walking in, dropping off documents, or making a simple change in name or address.

For walk-ins, the agency bypassed Compass Appointments' round robin feature that automatically distributes clients to caseworkers based on availability, as defined by automated business rules established by the agency. Instead, a clerical worker manually assigned each client. Caseworkers had to backfill the clerical work, creating even longer wait times for clients and more frustration for caseworkers.

"We identified that we were using the application almost the same way we were when we implemented six years ago and it didn't really change, while the responsibilities continued to change. A lot of the problems ended up being process issues, not really technology issues."



– Todd Shanley,
Cabarrus County
IT Manager

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"We worked harder than we needed to when we had a system that could have done it for us."



– Diane Gridley,
Economic Services
Program Administrator

How Did Cabarrus County DHS Turn Things Around?

To fix the problem, Cabarrus County DHS partnered with Northwoods to do a Health Check, where Northwoods evaluates how well software and business processes are working to meet business needs.

Northwoods solicited feedback from Cabarrus County DHS workers and IT staff in three ways:

1. A survey of end users prior to the on-site visit
2. Focus group meetings
3. Individual observations in the various departments

The Health Check uncovered these main challenges:



Regression

The agency developed inefficient workarounds and manual processes as a result of not upgrading the software for six years. The software was either not trusted, not understood, or did not match business needs.



Inefficient Processes

Manual processes and workarounds caused caseworkers to pick up clerical tasks and decreased all workers' efficiency.



Communication Issues

Management and IT were not effectively educating workers about technology or business process changes.



Poor Customer Service

The confusing and inefficient lobby flow led to long wait times and client frustration.

"What we found is they had multiple problems and that the technology was only a part of the issue. Their business processes have changed, yet the technology was not kept up to meet the business need. They had created many workarounds that really undermined system usages and the efficiency they could achieve, and were actually creating additional work for themselves."



– Greg Tipping,
Chief Services
Officer, Northwoods

Project Highlights

- Reduced client and caseworker frustration
- Improved lobby flow and reduced lobby wait time
- Helped manage ACA, NC FAST
- Sped up timely application processing
- Provided leadership visibility into operations
- Saved caseworkers 1-2 hours per day
- Repurposed 1 FTE, saving 40 hours per week

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"Northwoods does know human services. Sometimes companies come in and they don't really know what we do. Northwoods knew the process and they knew the procedure."



– Amy Nance,
Income
Maintenance
Supervisor II

Modernizing Business Practices to Improve Customer Service

Cabarrus County DHS implemented these key Northwoods recommendations:



Mitigate Regression

Upgrade Compass Appointments, fully utilize the software, and keep it on a current version to avoid regression.



Modernize Business Processes

Eliminate manual processes that can be automated in Compass Appointments to free up caseworkers and clerical workers to improve efficiency.



Improve Communication

Develop a cross-functional change management team, update standard operating procedures (SOPs), and develop ongoing communication and training for workers to improve morale and reduce regression.



Improve Customer Service

Redesign the lobby and add a greeter to improve client flow, reduce client wait times, and reduce frustration. Enforce the SOPs so the process is consistent for every client at every visit.

"When we did the Health Check, that helped us maximize the use of the technology and allowed us to free up human capital, which is what you want to do. We were able to reallocate time to other processes in the agency that needed the attention."

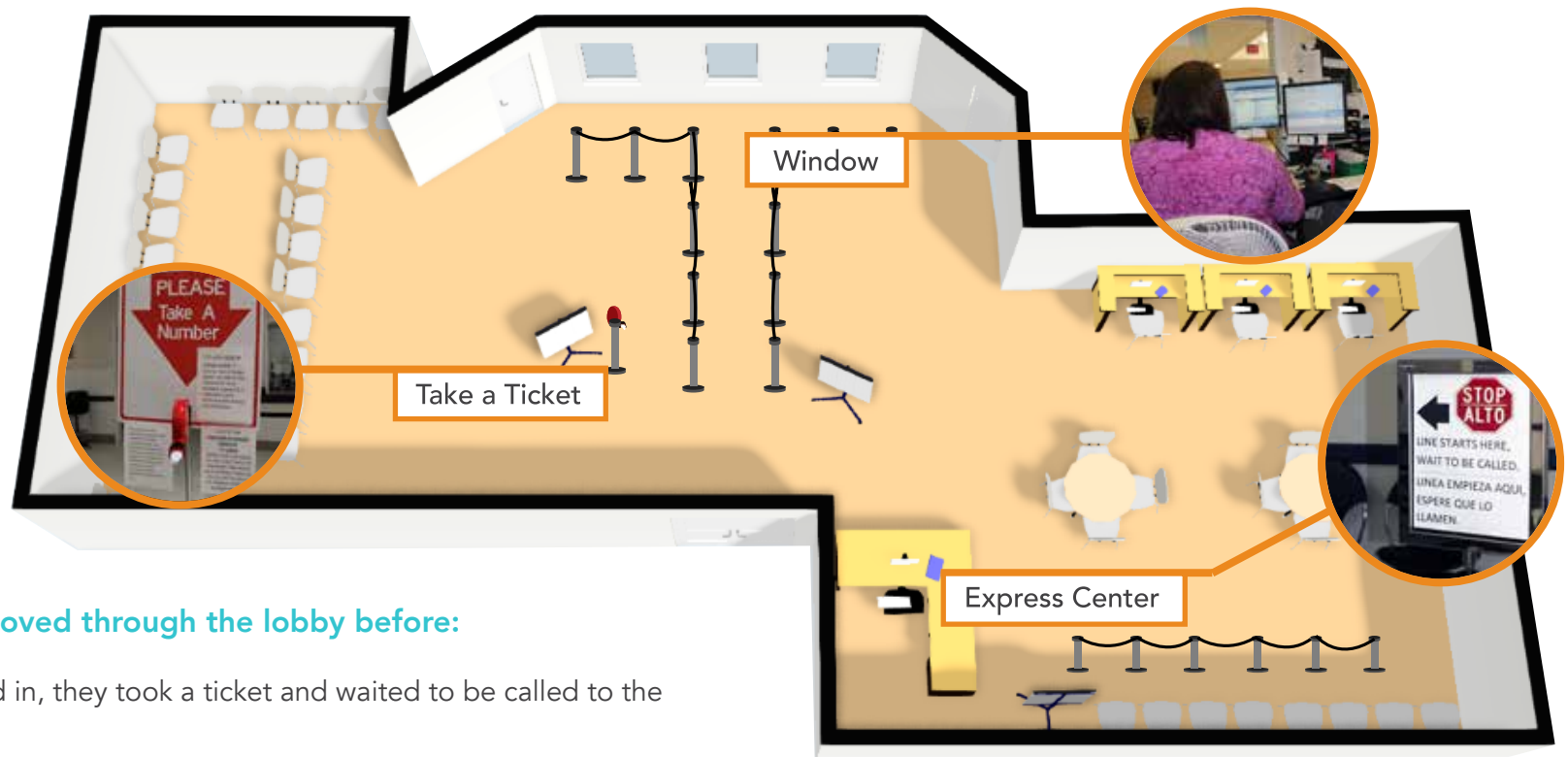


– Ben Rose, Director of Human Services

Inefficient Lobby Caused Client Frustration

"Chaos." That's how caseworkers and clients described the lobby.

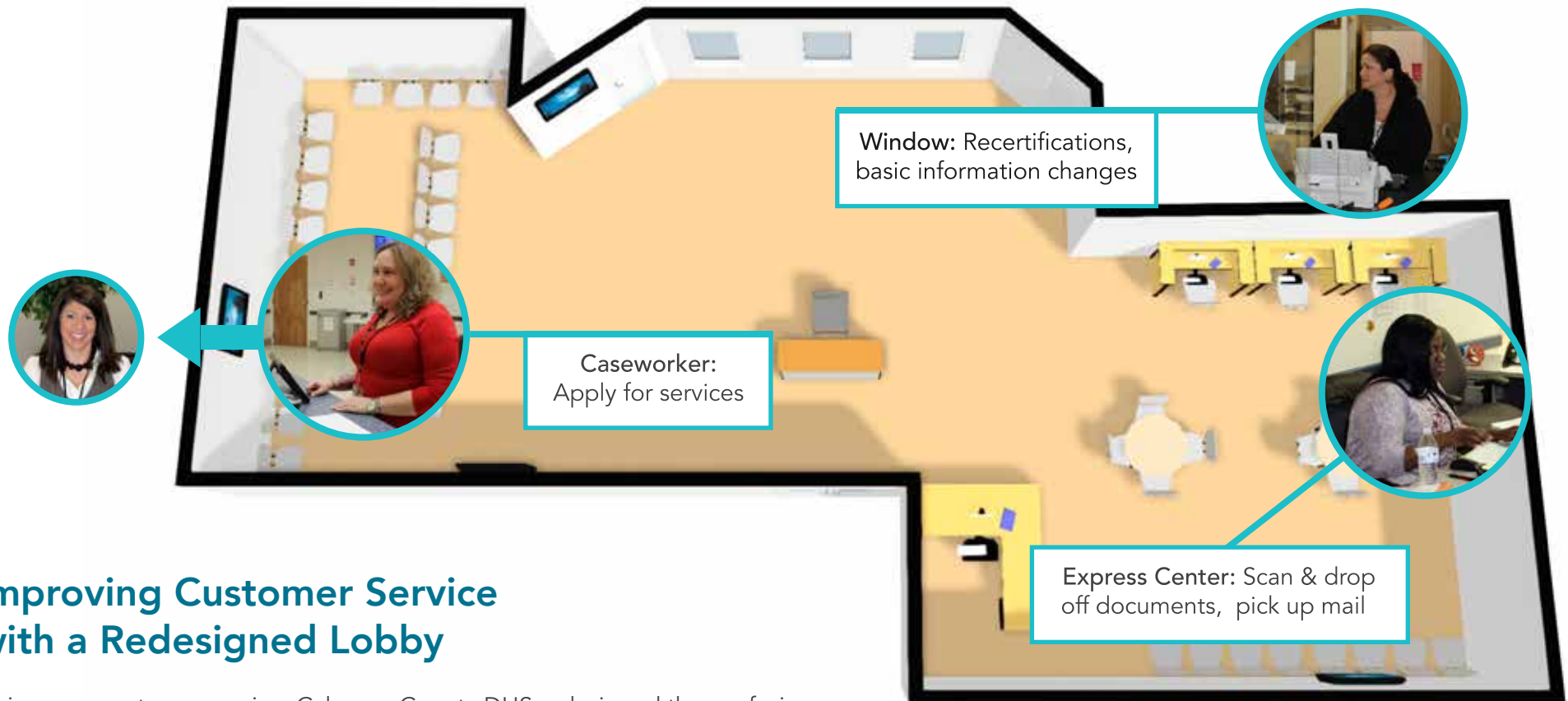
"Client frustration is noticeable, especially in the lobby. They don't know where to go. We thought we had done a good job with signage. We thought the process was easy to follow. But if you stand in the lobby, it's that deer in headlights look," said Diane Gridley, Economic Services Program Administrator.



Here's how clients moved through the lobby before:

1. When clients walked in, they took a ticket and waited to be called to the window.
2. After the window, clients were either sent to the Express Center to drop off documents or pick up mail, or back to the lobby to wait for a caseworker.
3. Clients who were just dropping off documents or picking up mail often sat in the same long line as those applying for services when they could have gone straight to the Express Center.
4. Clients changing an address or getting a recertification waited in the same long line as well.
5. Clients waiting to see a caseworker sat in the lobby, sometimes up to two hours during busy times, without any indication where they were in line.

This process created one of the biggest challenges in the lobby: long waits for clients. By the time caseworkers got clients from the lobby, they would be so upset it delayed the caseworkers from working on applications because they had to defuse clients' frustration.



Improving Customer Service with a Redesigned Lobby

To improve customer service, Cabarrus County DHS redesigned the confusing and inefficient lobby flow to decrease wait times and reduce client frustration.

Here's how clients move through the lobby now:

1. When clients walk in they immediately speak to a greeter, who electronically checks them into Compass Appointments on a tablet and directs them to one of three areas: Express Center, window, or the caseworker.
2. Clients heading to the Express Center or window bypass waiting in the lobby.
3. Clients meeting with a caseworker are added to a specific queue based on what services they are applying for and wait in the lobby until their appointment time.
4. Monitors in the lobby show clients their place in line, then ding and light up when their caseworker is ready.



Benefits of the Redesigned Lobby



The new process eases client frustration because they know where to go and can see where they are in the lineup.

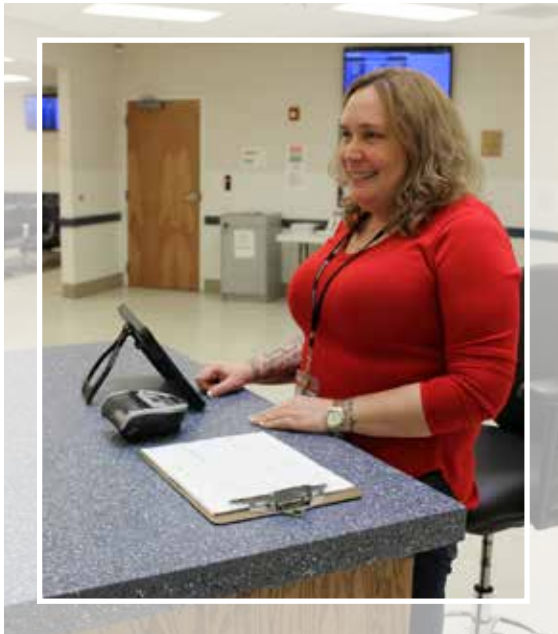


Caseworkers are no longer spending appointment time explaining long lobby waits and dealing with frustrated clients. They have time to focus on processing applications and providing good customer service.



Caseworkers are saving 10-20 minutes per client. Caseworkers seeing 5-6 clients per day are saving one to two hours daily that they can use to process their cases and collect necessary information, documentation, and verifications. They can then process new applications faster.

How Does the Greeter Improve Customer Service?



The greeter has been an amazing addition that not only improved efficiency in the lobby, but adds a personal touch to what is a very emotional and sometimes difficult experience for clients.

"Someone this morning said 'I'm so glad to see somebody instead of a machine, to see a person.' People like to see a smiling face when they walk in," said Vessie Tenorio, Income Maintenance Caseworker I.

"We've had so many clients comment on how our system is better and how their wait times were significantly cut down. A lot of the clients are happier since we implemented the Northwoods system."



– Theresa Bryant,
Income
Maintenance
Caseworker II

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"That means that families have food to eat and medical care. And those are two things that are very important."



– Pam Dubois,
Senior Deputy
County Manager

Manual Processes Create Worker Stress and Inequitable Workloads

Behind the scenes, caseworkers felt overworked and stressed for two main reasons:

1. Manual process didn't ensure cases were distributed evenly
2. Caseworkers took the brunt of clients' frustration from long lobby waits



Assigning one clerical worker – a full time equivalent – to manually distribute clients to caseworkers introduced several issues:



No Tracking

Even when work was being assigned fairly, the agency had no way to track how clients were distributed to assure caseworkers that workloads were fair.



Limited Client Information

Caseworkers felt unprepared to serve clients, which added stress. Trying to get basic background information cut into their time to help clients.



Risk

The potential for human error in a manual process meant some caseworkers were overloaded with cases.



Lost Productivity

Pulling one full-time clerical worker cost the agency 40 hours of productivity in other areas, which had a ripple effect. Caseworkers at the front desk had to do clerical work like sorting mail instead of exclusively working on recertifications and simple changes. Higher level caseworkers had to help with recertifications and simple changes instead of solely focusing on processing applications for services.



Stress of Managing Frustrated Clients

Caseworkers spent the first several minutes of appointments defusing clients' anger about wait times, which put them behind schedule and left less time to focus on helping the client access services.

Boosting Worker Morale and Improving Productivity

To boost worker morale and help caseworkers process applications more efficiently, Cabarrus County DHS took two critical steps:

1. Upgrade Compass Appointments to take full advantage of its automated features
2. Revamp business processes so the right workers are working on the right tasks



Automated Distribution

Compass Appointments' Round Robin feature automatically assigns clients to the next available caseworker and tracks workload so the distribution is even across workers in a specific unit.



Reporting

Supervisors and program managers can pull reports to verify work is balanced among caseworkers.



Improved Productivity

The agency is saving 40 hours per week because the person who was previously manually distributing cases was moved back to doing clerical work, freeing up front desk caseworkers to focus on recertifications and simple changes and higher level caseworkers to process applications.



Understand Client Needs

When the greeter checks clients into a specific queue, such as Adult Medicaid or energy assistance, the caseworker knows exactly what benefits clients are applying for. In addition, the greeter can include notes the caseworker can review before meeting with clients.



Less Client Frustration Reduces Stress

Clients' wait times are reduced, so caseworkers spend much less time defusing client frustrations and more time helping them access services.

"It was a huge overhaul, but it was worth every dime. The employees feel more empowered with the job that they are doing. They feel like they have the resources that are necessary. They smile a lot more."



– Pam Dubois,
Senior Deputy
County Manager

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"We're not guessing 'why is this client here? What are they applying for?' We get a heads up and we can get better prepared when it's time to pull the client back."



– Theresa
Bryant,
Income
Maintenance
Caseworker II



Lacking Visibility Into How Many Clients Are in the Lobby and Why

When Cabarrus County DHS created manual workarounds to move clients through the lobby, management lost its visibility into how many clients are in the lobby, who they are, and why they are visiting.

The lack of visibility caused several challenges:

Not Understanding Clients' Needs

To operate efficiently, the agency needs to know why clients are in the lobby. Are caseworkers not answering their questions on first visits? Did clients forget to submit verifications? Is there a more efficient way to handle telephone calls so clients don't have to come in?

Can't Adjust in Real Time

Not knowing how many clients are in the lobby for what reasons handcuffs the agency from shifting caseworkers on the fly to meet daily needs. This was especially challenging during busy times such as Food & Nutrition recertification deadline day, or crisis and energy assistance seasons.

Lack Data to Justify Resources

Cabarrus County DHS knew the lobby was overloaded, but didn't have compelling data to request additional staff or other resources to ensure client applications are processed in a timely manner.

Improved Insight for Management

With Compass Appointments, supervisors and managers now have a complete view of who is in the lobby and why – from clients dropping off documents to those applying for multiple services. Reports available through Compass Appointments also help management track and determine staffing needs and determine if cases are being equitably distributed.

Understand Clients' Needs

Agency-specific queues in Compass Appointments automatically record why clients are visiting. In addition, the greeter can add notes to help caseworkers understand clients' needs before an interview even starts. Management can use the information to help caseworkers consistently collect information so clients don't have to make unnecessary trips to the agency.

Real Time Staffing Adjustments

When the lobby is unexpectedly busy, the agency can quickly add a greeter to move clients through the lobby more quickly. In addition, the dedicated queues allow supervisors to quickly adjust staff in the lobby if more workers are needed to report a change versus apply for benefits.

Reliable Data to Justify Resources

Cabarrus County DHS has data on who and how many clients are visiting down to the minute. This gives management support to request additional staff for consistently busy units, or temporary staff for short-term busy times such as Low Income Energy Assistance Program season.



"It's given us data that we've not previously had so that we can focus on making some changes to make the process better."

– Diane Gridley, Economic Services Program Administrator

"Once we get them into queues we know who's here, we know why they're here and it allows us to manage that process better. If we have clients here to maybe do an intake versus report a change we can prioritize who's in the lobby and get them to their workers in a much more efficient manner."



– Diane Gridley,
Economic Services
Program Administrator

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"Now it's budget time so if program managers need to submit for a new worker, they have the numbers and the proof through this new lobby piece to break it down and see in a detailed manner."



– Marie Spain,
Government Business
System Analyst

Poor Communication Created Inconsistent Service Delivery

Poor communication from management left caseworkers feeling confused about the processes they were expected to follow. In addition, IT is housed with the county, not the agency, so communication breakdowns between IT and the program side were common.

The communication issues caused several challenges:



Inconsistent Processes

Workers developed disjointed, manual processes to get their jobs done. Clients experienced different processes depending on which worker they worked with.



Poor Communication Methods

The agency relied on email to communicate changes, which was often missed by caseworkers. In addition, management failed to explain why business processes were changing so caseworkers didn't understand how it impacted them or how it fit into the big picture.



Technology Mismatched to Business Needs

Cabarrus County DHS fell into a familiar pattern: the program side asks for IT help; IT provides technology; the program side doesn't use the technology because it doesn't match business needs; IT gets frustrated because the technology isn't being used.

"There was one situation that we changed the way we were going to do Medicaid applications. We sent out the duty changes and job changes in one email. And some folks were doing one thing one afternoon and the next morning they were doing something else."

– Diane Gridley,
Economic Services Program Administrator



Improving Communication Boosts Customer Service



Standard Operating Procedures (SOPs)

Northwoods created SOPs for Cabarrus County DHS so all workers understand the processes. Clients have a similar experience every time they visit the agency.



Business Analyst

To bridge the communication gap between IT and the program side, IT dedicated a Business Analyst to the project who understands the technology, but was immersed in the agency processes to understand how the technology will or won't meet the business needs. The Business Analyst will also help with ongoing needs.



Improved Communication Methods

Internally, the agency banned one-size-fits all emails. Now a cross-functional change management team determines process changes, which they take back to their teams through one-on-one or department meetings. Workers hear the same message. Because the changes are explained by their supervisors, workers understand how new processes and software impact their specific roles.



"The value that Northwoods brings is understanding a department of human services and knowing what the needs are."

– Diane Gridley,
Economic Services Program Administrator



Conclusion

Cabarrus County Department of Human Services redesigned its lobby, updated technology, and refreshed business processes to better meet the needs of clients. The overhaul has had a positive ripple effect throughout the organization:

- Reduced client and caseworker frustration
- Improved lobby flow and reduced lobby wait time
- Helped manage ACA, NC FAST
- Sped up timely application processing
- Provided leadership visibility into operations
- Saved caseworkers 1-2 hours per day
- Repurposed 1 FTE, saving 40 hours per week

Thanks to recommendations in the Northwoods Health Check, the agency implemented proven human services best practices to maximize efficiency and customer service.

The changes mean happier clients and caseworkers, who can focus on doing what they do best: helping people in need.



About Northwoods

Northwoods' only focus is helping state and county human services agencies increase client service levels and productivity while cutting costs — allowing them to do more with less. Northwoods' human services software solutions are designed around caseworkers and social workers, not data. Our Compass® products automate the flow of client and case information based on how caseworkers throughout the agency need to use it. To learn more, visit teamnorthwoods.com.

"I think this new system has really allowed us to improve the customer flow, the lobby flow. People are getting immediately served and immediately queued instead of sitting down waiting and getting impatient. I think we've gone from a really outdated system to where we need to be and it's been phenomenal."

– Ben Rose,
Director of
Human Services



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