

San Joaquin County Uses Appointment Management for Caseworkers to Eliminate Lobby Wait Time

With up to 2,000 clients visiting each day, San Joaquin County Human Services Agency has one of the busiest lobbies in California. However, the inefficient manual process used to manage lobby traffic and client appointments was unworkable. Since implementing Northwoods' lobby management and appointment management for caseworkers, the agency has eliminated lobby wait time, achieved same-day appointments, and reduced client and caseworker frustration.

Project Highlights

- Eliminated 3-4 hour lobby wait time
- Aided in processing expedited cases within required timeframes
- Helped manage ACA
- Enabled same-day interviews for new applicants
- Reduced client and caseworker frustration

Business Need

Every day, up to 2,000 clients visit the San Joaquin County Human Services Agency (HSA). However, the agency was using an inefficient manual process to manage client appointments and walk-ins, leaving thousands of people waiting in line for up to four hours to apply for aid, meet with a caseworker, or simply drop off documents.

To check in, clients either used in-house phones to call a worker directly or relied on lobby workers to call or physically notify caseworkers when they arrived.

There was no escalation process for clients when they could not track down a caseworker. Clients could be left waiting in the crowded lobby for hours, frustrated.

Many left the agency without seeing a caseworker, which threatened the agency's ability to administer emergency benefits within the required 72 hours.

The manual system had no reporting mechanism to help supervisors and managers determine why clients were waiting in the lobby or how many clients left the agency unseen.

Finding a Solution

In 2008, San Joaquin County HSA became the first county in California to implement Compass® Appointments and Compass® Appointments Kiosk for Income Maintenance (Medi-Cal, CalFresh) and Welfare to Work (CalWORKs) for many reasons.

First, the San Joaquin County HSA could take advantage of scheduling functionality that is not available in large-scale or consortium-based systems. Also, the information technology staff approved of the straightforward technical infrastructure, which they could easily manage

and configure. Finally, Northwoods' expertise in human services, specifically in eligibility, was a big selling point in the decision to implement Compass Appointments.

Results and Benefits

Since implementing Northwoods' Compass Appointments and Compass Appointments Kiosk, San Joaquin County HSA has eliminated lobby lines and completely overhauled how clients are scheduled and move through the agency, reducing frustration for clients, caseworkers, and supervisors.

Eliminate Lobby Wait Time

To help redesign the flow of the lobby to ensure clients are quickly routed to the right location within the agency, San Joaquin County HSA installed self-service kiosks in the lobby, allowing clients to check themselves in for scheduled or walk-in appointments.

Information Systems Manager David Heldt said the agency initially added too many kiosks with too many options, which caused confusion for clients, especially those with language barriers or literacy problems.

Learning from that experience, the agency now uses four kiosks dedicated to specific actions. Two of the kiosks are dedicated to clients checking in for pre-scheduled appointments. Another kiosk solely allows clients to drop off documents without waiting in additional lines. The fourth kiosk is used for fingerprinting and Electronic Benefit Transfer (EBT).

Appointment Scheduling Productivity

Once a client checks in, Compass Appointments sends an electronic notification to the caseworker. If the worker does not respond, an escalation process is activated.

"The best part of Compass Appointments is that the client can check in and it sends a message to the worker. If that person never responds, that message can escalate to the appropriate people. The idea that the system escalates the client's need without the client having to escalate it is probably one of the greatest benefits for us," said Kevin Stamper, Program Manager, Intake Division.

The solution goes beyond improving lobby traffic. Compass Appointments improves efficiency because hundreds of eligibility workers can maximize pre-determined appointment slots even when curveballs come their way.

For example, San Joaquin HSA had an influx of clients eligible for Medi-Cal, California's Medicaid program, with the passage of the Affordable Care Act (ACA). Although ACA does not require in-person interviews, workers could still use Compass Appointments to schedule phone interviews for Medi-Cal eligible clients through a call center.

ACA also caused an increase in applications for CalFresh, California's Supplemental Nutrition Assistance Program, because most clients eligible for medical assistance are also eligible for nutrition assistance. Compass Appointments helped the agency manage the influx of applications coming in through intake.

"We wouldn't have survived ACA without Compass Appointments. It provided smooth management during times of radical growth," Heldt said.

Improved Insight for Management

With Compass Appointments, supervisors and managers now have a complete view of all appointments. Reports available through Compass Appointments also help management track and determine staffing needs, evaluate compliance with state and federal mandates, and determine if cases are being correctly distributed.

The insight allows Intake Program Manager Kevin Stamper to ensure appointments are spread out over multiple days for the 70 eligibility workers he supervises. This minimizes worker and client frustration and helps ensure the agency is able to meet mandated emergency timeframes without tapping into additional resources.

The insight has greatly improved business processes throughout the agency.

"Compass Appointments has given us insight and made us more ready to adapt to change. It's affected every decision from whether time off is approved to whether I need to ask my supervisor for more employees," Stamper said.

San Joaquin County HSA has achieved same-day processing for new applicants, which greatly reduces the likelihood that a client will apply for benefits but not return for a required appointment. Previously, caseworkers had to deny benefits for no-shows, who typically reapply for benefits. Re-applications unnecessarily increase workload. By watching the flow of clients through Compass Appointments, Stamper realized that early morning appointments did not leave enough time for staff to get clients processed and to their appointments in the same day. By adjusting the schedule to have those appointments later in the day, the agency can serve new clients within hours. This is a huge benefit for clients, who get the benefits they need more quickly, and helps the agency fully utilize resources.

To further boost productivity, the agency created a no-show unit to handle clients who miss appointments. This enabled caseworkers to trade a CalFresh or CalWORKs no-show, which requires a face-to-face meeting, with a Medi-Cal case, which does not require face-to-face interaction. Caseworkers can still process cases without wasting an appointment slot.

Conclusion

Compass Appointments helps San Joaquin County HSA streamline the lobby to eliminate client wait time. Behind the scenes, automatic escalations and flexibility in scheduling help the agency ensure clients receive necessary benefits and meet mandated compliance requirements and emergency timeframes. The appointment management tool also gives San Joaquin County HSA insight into operations, which positions the agency to handle current and future challenges.

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.

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