Case Study

Santa Clara County Social Services Agency Streamlines Aid Requests with Clarity Service Desk Manager

Client Profile

Organization: Santa Clara County Social Services
Industry: Government

Business

Santa Clara County Social Services Agency provides financial and protective services for the county's most vulnerable people, including children, the elderly, and low income families.

Challenge

With increasing demand for the agency's services, the agency needed to re-examine how it processed aid requests and how it could help more people with fewer resources.

Solution

Santa Clara County Social Services Agency deployed Clarity Service Desk Manager (Clarity SDM) to facilitate a new task-based process that streamlines and automates the management of aid requests.

Results

The agency can now process more requests in a shorter timeframe, improving service to customers. The agency will also be able to manage a large increase in requests that has resulted from health care reform across the United States.

Business

Helping the County's Most Vulnerable Residents
Santa Clara County Social Services Agency provides financial and protective services for the 1.7 million residents of Santa Clara County.

These services are provided by three departments:

• The Department of Aging and Adult Services helps seniors, dependents, and the disabled through quality nutrition and supportive in-home and protective services.

• The Department of Employment and Benefit Services helps people find employment and ensures that low-income families receive health services.

• The Department of Family and Children's Services is responsible for prevention, intervention, advocacy, and public education related to the protection of children and their need for consistency in care and nurturing.

The organization's 2,400 employees deliver high quality and professional services to eligible residents in a manner that is culturally sensitive and that encourages personal responsibility.

Challenges

Delivering Services to More People with Fewer Resources
Mary Shamouel, CIO at Santa Clara County Social Services Agency comments, "Over the years we have seen an increase in the number of people applying for services and benefits. With a shrinking budget, we needed to find a way to deliver these services more efficiently and at a lower cost to cope with the strain on resources."

The agency's existing processes for dealing with requests for government assistance (county, state, and federal) were manual, complex, and time-consuming. Employees kept track of cases using numerous disparate systems and documents.

In addition, health reform across the United States meant that the agency was to experience a significant increase in demand for its services. Adesh Siddhu, Director of Applications at Santa Clara County Social Services Agency, explains, "The number of people eligible for our services will double as a result of US health reform but need to be managed with existing resources."

To maximize staff efficiency, Santa Clara County Social Services Agency developed a task-based procedure for processing requests. To support this new approach, it needed a flexible and reliable IT platform. Shamouel comments, "We have always seen technology as a business enabler, and recognized that an IT solution that offered automation and integration could enable employees to manage a larger caseload while still processing requests within the required three-day timeline."

Solution

Streamlining the Process for Requesting Aid
To support its new task-based processes, the organization decided to use Clarity SDM. Shamouel comments, "We were already using the solution within the IT department to create tickets and assign tasks, and realized our new approach to managing aid requests followed a similar model." Siddhu adds, "While there were products that provided queue management or back-end task management, Clarity SDM was the only solution that married the two."

The agency deployed Clarity SDM to manage aid requests in November, 2010. The solution was configured with assistance from CA Services so that it aligned with the processes and business language that Santa Clara County Social Services Agency uses. The agency uses Clarity SDM at several sites where employees are involved in face-to-face interaction with customers, as well as sites without face-to-face interaction. "The solution supports the aid request process end-to-end through integration with a number of systems and automated ticket and task management," explains Shamouel. "Around 300 case workers and 300 front-desk employees use the solution on a daily basis."

Solution (cont.)

The face-to-face aid request process follows these steps:

- The customer uses touch-screen monitors at the site entrance to select the service for which they wish to apply, for example Medi-CAL.
- The customer is issued a ticket number through an integration between the touch-screen monitor and Clarity SDM.
- The request queue is available to all window agents; as an agent selects the next request, the system automatically associates that with the corresponding window.
- The ticket number is displayed on a marquee system with the appropriate window number.
- An employee at the front-desk sources information from the customer, prioritizes the case, and updates the case management system.
- Relevant tasks are automatically allocated to a case worker using Clarity SDM.
- The case workers view their task list using the solution and close a ticket once the aid request is fully processed.

There are other requests that do not require a face-to-face interaction and are initiated by a customer, such as ongoing follow-ups, or requests that come in by mail or fax, and so on. A specially designed interface means that tickets can be automatically raised and allocated through Clarity SDM based on events and alerts in the case management system. More than 2,000 tasks are created on a daily basis using the solution. The solution integrates with the agency's workforce management system to ensure that tasks are only assigned to employees that are at work and available that day.

To enable comprehensive reporting and to help the agency evaluate its performance against key performance indicators, Clarity SDM is also integrated with SAP BusinessObjects and the data warehousing system for the Santa Clara County Social Services Agency. Siddhu explains, "The reporting available via Clarity SDM not only helps us efficiently allocate and process the day-to-day workload, it also enables us to see trends so that, for example, we can better manage staff working patterns or training needs in specific locations according to the type and volume of requests that they deal with."

The ease with which information can be accessed and maintained also means that staff can answer customer queries more quickly and accurately than they were able to previously when information was held in several places. In addition, reporting data can be shared with union representatives so that discussions are based on accurate information and parties can collaborate more effectively.

Results

Increasing Staff Efficiency to Improve Customer Service
The streamlined process has reduced the administrative burden for Santa Clara County Social Services Agency. Shamouel comments, "We have made a major step-change in the way that we process aid requests. Although we have not yet completed a formal evaluation, it is obvious that better visibility of their tasks has enabled our members of staff to operate much more efficiently."

"We can now help more people receive the aid they need to improve their quality of life."
~ Mary Shamouel CIO, Santa Clara County Social Services Agency

Using Clarity SDM to help process requests for aid has helped the agency to: process more requests in a shorter timeframe, allocate resources more effectively, enhance the discussions about staffing and training needs, and improve the customer experience.

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