**DANE COUNTY LOBBY WORK FLOW**

**Goal:** The EAWS team strivesto provide the essential lobby services while maintaining a high caliber of customer service.

**Dane County Department of Human Services Vision:**

*Empowered people thriving in safe, just and caring communities.*

# Customer Service

* All workers in the lobby contribute to the agency’s overall customer service. In keeping with this, there may be occasions for a worker from one area to alert a worker from another area to a customer waiting to be assisted. We must remember to use courteous communication with our coworkers as part of a positive customer experience.
* When scheduled for lobby duty, it is important to have appropriate conversations both with clients and other staff members. Confidential information must remain confidential, and personal information should not be shared.
* The use of personal cell phones for texting, phone calls or social media while at the front desk is not acceptable.
* Greet each customer in a friendly manner, once they put in case or SSN please confirm name, address and phone number on file as current. During the interaction using the name of the person you are serving makes the interaction more personal and shows empathy.

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# Lobby Staffing

## Overview:

The lobby will be staffed from 7:45-4:30 as follows:

* A Reception Agent (Customer Service Specialist -CSS), will greet customers and assign a ticket to queue based on needed service.
* 2 IM Agents (1 English/1 Spanish) will provide Front Desk (FD) services.
	+ All Economic Support Specialists must report to assigned desk by 7:45am for start of AM shift and 12:00pm for start of PM shift. If no one comes to replace you, notify the lobby lead.
	+ When on site and scheduled for FD or On-Call Lobby (OCL) your lunch time may be different, follow schedules as posted on

 <https://capital-im.com>

* + - * Follow path (Dane specific-Policy & Procedures-Schedules)
* An OCL Family Agent and an Elderly, Blind & Disabled (EBD) Agent will provide lobby overflow services and assistance for complex case work, intake(s) and review(s).
* When scheduled On-Site at JCO, ESS may be needed for coverage.
* A Lobby Lead Agent will oversee lobby services and coordinate with the call center Administrator(s) to pull an additional worker(s) for assistance when necessary.
* A Benefits Desk Agent(s) will provide support services.
* An Emergency Assistance (EA), Wisconsin Works (W2) and EA Clerical Agent will provide following resources:
* Customers looking only to apply for EA may do so at [access.wi.gov](file:///%5C%5Cdaneco.us%5CDFS%5CHome%5Ckmr1%5CMy%20Documents%5Caccess.wi.gov). If they have any questions about the program they may be directed to the EA queue, email emergency.assistance@countyofdane.com, or leave a message with 608-242-7458.
* Customers looking only to apply for W-2, or JAL may do so at [access.wi.gov](file:///%5C%5Cdaneco.us%5CDFS%5CHome%5Ckmr1%5CMy%20Documents%5Caccess.wi.gov) or by calling (855) 733-1311.
* Customers who have created but are unable to login to their ACCESS accounts may call 1-800-362-3002 for assistance unlocking or recovering their account.

**Agent Assignments:**

## Reception Agent - Customer Service Specialist (CSS):

The CSS will greet customers, determine the reason for the visit, and assign ticket for needed service(s).

The CSS will refer customers to the phones or computers to complete their program add, change, review, intake or to ask case specific questions. Volunteer organizations are on site at times to assist with ACCESS applications.

Ask customer to take a seat and refer to monitors to watch/hear when ticket is called to FD.

Customer must be informed of all other options for applying and provide the necessary information to do so:

* In person – provide paper application
* Phone – 1-888-794-5556
* Online – access.wisconsin.gov
* By mail - provide local address

If the customer has completed an ACCESS application or review:

Have the customer print the application/review for their records. Customers should be made aware of the ACCESS tracking number as this will be requested when they call the Capital Consortium. If request includes the FoodShare program, advise customerthat they will get a call same/next day for an intake.

\*If customer needs immediate service, direct customers to the phone bank, phones 1-3 will connect to the CCC (Capital Call Center) to complete their application.

If the customer finishes their Access application at 4 pm or later, they can no longer call the CCC to finish their application. If the application contains FoodShare, advise customer that a worker will be assigned to call them the next day or they can call CCC 7:45am-4pm.

**JCO Front Desk configuration:**

**Window 1: Customer Service**

**Window 2: ADA Desk**

**Window 3: Benefits** Prefix A and Number Range 100-299

* Customers requesting drug test paperwork. Support staff will log and case note this information in CARES.
* Customers picking up mail.
* Customers purchasing a low-income bus pass.
* Customers in need of vault or temporary Quest cards.

**Windows 4 & 5**: **IM** Prefix C and Number Range 400-599 and EBD Prefix D and Number Range 600-699

* English, Hmong and Spanish speaking clients served
* If Hmong worker is needed, email Lobby Lead Agent and they will refer to onsite Hmong worker or OCL using language line.
* BCP/MAPP premium customers
	+ - Applicants who do not wish to or are unable to use ACCESS or the phone to complete an application, renewal, and/or report changes.
		- Customers needing paperwork reviewed
		- Case questions

**Window 6: EA Clerical** Prefix B and Number Range 300-399

* The EA Clerical agent accepts applications for EA and schedules same day appointments for this program. Will process W-2 RFAs, schedule the required eligibility appointment, notify Forward Services Corporation (FSC) for resourcing, and assist with questions related to W-2 when W-2 worker not available.  Will process JAL RFAs, schedule the required eligibility appointment, and assist with questions related to Job Access Loan (JAL) when W-2 worker not available. Will also notify FSC Management as necessary for escalated issues.

**Window 7: W-2** Prefix E and Number Range 700-799

* Customers with questions about JAL or W-2.
* Assign to combine EA/W-2 Queue when W-2 worker not available

**Prior to clicking “complete/finish” in Q-Flow, ask customer if they need assistance with another service (benefits, EA, W2, IM, EBD) and route the ticket appropriately.**

# Q-Flow Administrators:

* Heidrun Kovach & Brenda Nickel

# On Call Worker:

* The On-Call Lobby (OCL) Family Agent and EBD Agent will remain on the phones until needed or directed by Lobby Lead Agent. The OCL will be first call for assistance by the Lobby Lead for any overflow from the FD.

# Lobby Lead:

* The Lobby Lead Agent will monitor the number of customers that are waiting in the lobby. At 4pm, the Lobby Lead Agent will be in the lobby to make sure we can assist customers prior to 4:30pm. If needed, the Lobby Lead Agent will take over for the assigned FD staff if completion of task will take them past their ending time.
	+ SP-10 End of Day Procedures FD/Call Center
* The Lobby Lead Agent will be the first call for questions and concerns from the front end workers.
* The Lobby Lead Agent will be the first call in the escalation of a customer concern.
* The Lobby Lead Agent will contact the OCL(s) when needed.

# Lobby Customer Escalated Procedures:

## Front Desk Escalation:

* The FD staff will do their best to de-escalate any customer situation according to program policy. Remind the customer of the fair hearing process and offer this when appropriate.
* If customer is still unsatisfied, send an email to the lobby lead for assistance.
* **Confidential Case** – All lobby customers with a confidential case will be escalated to lobby lead to handle.

## Lobby Lead Agent Escalation:

* The lobby lead agent will do their best to de-escalate any customer situation. Discuss the fair hearing process with them when appropriate.
* If the lobby lead still cannot de-escalate the situation, the lobby lead will send an email to Heidrun Kovach for assistance. Brenda Nickel is the back up for Heidrun. If both are unavailable, the lobby lead will send an email to the Dane supervisors email distribution HSEASups@countyofdane.com to seek assistance from any available supervisor.
* **Confidential Case** – When the lobby lead agent is called to assist with a confidential case by the lobby staff, send an email to the Dane supervisors at HSEASups@countyofdane.com The supervisor with the ability to make the case not confidential will do so and reply to the lobby lead. Lobby lead agent will assist the customer. Once case processing is complete, email the supervisor who assisted you to make the case confidential again if necessary.

# Document processing while at FD:

# Documents for all programs (FoodShare, Healthcare and Childcare) will be processed by the FD IM agent(s) *only when* it would immediately impact the benefits for the customer. This would *include overdue verification items* (case is closed for that program or closed completely) and items due same or next day.

# Child Care (CC) potentially requires further questions to be asked, detailed case notes and the completion of an authorization. Therefore, you should notify the Lobby Lead agent for assignment to the OCL.

# EBD verification items may need an EBD-ESS to look them over to ensure we have the needed verification. Therefore, you should notify the Lobby Lead agent for assignment to the EBD-OCL.

# What to do with documents received at Front Desk:

There are 3 different slots to put items received:

**APPs slot**

Any paper applications received while at the front desk.

This could include any type of application, but the majority will be “Page One FoodShare Registration” apps and “Signature Page” apps.

**ScanFirst slot**

(Documents **not processed** yet)

* **Date stamp** each page
* Write **case number** on top right of the document
* **Code** each document with correct **scanning** code
* **Name of customer** (if applicable)
* **Paper clip** together all documents for one case

**ProcessFirst slot**

(Documents **already processed**)

* **Date stamp** each page
* Write **case number** on top right of the document
* **Code** each document with correct **scanning** code
* **Name of customer** (if applicable)
* **Paper clip** together all documents for one case

# BCP Premium Customers:

* Make sure the case number is written on the check or money order. Confirm that the correct amount was paid, and log the premium on the premium log. Give the customer an information sheet on where to send future premiums (see below). The Lobby Lead agent will process premium payments.

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| **BC+****c/o Wisconsin Department of Health Services****P.O. Box 93187****Milwaukee, WI 53293-0187** | **Medicaid Purchase Plan****P.O Box 6738****Madison WI 53716-0738** |