



LOBBY WORKFLOW

LOBBY OPERATIONS | FRONT DESK SERVICES | SAFETY

DCDHS – Economic Assistance & Work Services

LOBBY AND FRONT DESK EXPECTATIONS

- Staff assigned to lobby or front desk responsibilities are expected to contribute to a professional, respectful, and customer-focused environment.
- Staff must communicate courteously with both customers and coworkers at all times.
- Client confidentiality must be maintained in all lobby and front desk interactions.
- Personal cell phone use, including texting, personal calls, and social media, is prohibited while working at the front desk.
- Staff are expected to greet customers promptly, verify demographic information, and provide service in a professional, empathetic manner.

LOBBY AND FRONT DESK STAFFING

The lobby will be staffed from 7:45 a.m. to 4:30 p.m. as follows:

- One (1) Customer Service Specialist (CSS)
- One to two (1-2) Benefits (BN) Specialists
- Two (2) Income Maintenance (IM) Specialists (Economic Support Specialist)

Shift Coverage Expectations

- Once the Humanity schedule is finalized, the only changes that will be made are those required when staff call in sick for the day.
- All IM Specialists must report to their assigned desk by 7:45 a.m. for the start of the AM shift and by 12:00 p.m. for the start of the PM shift.
- If a replacement worker does not arrive at the start of the next shift, staff must notify the Lobby Lead immediately.

Additional Support

- A Lobby Lead Agent will oversee lobby services and pull additional worker(s) for assistance when necessary.
- An OCL Family Agent and an Elderly, Blind, and Disabled (EBD) Agent will provide overflow lobby coverage and assistance with:
 - complex case work
 - intakes
 - reviews
 - translation services

(see page 5 – [ON-CALL LOBBY OCL DUTIES](#))

AGENT/WINDOW ASSIGNMENTS

To support consistent and efficient customer service, all customers should begin at the Welcome Window with the Customer Service Specialist (CSS).

Lobby Front Desk / Window Assignments

→ Welcome Window / CSS – Window 1

Function: Customer Service; assign appropriate ticket for needed service(s)

→ Benefits (BN) – Windows 2 & 3

Prefix: A

Number Range: 100-299

These windows serve customers who are:

- picking up mail;
- requesting drug test paperwork;
- requesting a temporary QUEST card.

→ Income Maintenance (IM) – Windows 4 & 5

FAM Prefix: C

FAM Number Range: 400-599

EBD Prefix: D

EBD Number Range: 600-699

These windows serve customers who are:

- English-, Hmong-, and Spanish-speaking customers;
- requesting in-person services vs. ACCESS or the phone to complete:
 - an application
 - a renewal
 - a reported change
- needing paperwork reviewed
- asking questions about their case

**Screening distinctions for EBD may include:

- | | |
|--------------------|--|
| ▪ MAPP | ▪ Social Security |
| ▪ Medicare | ▪ SSI |
| ▪ medical expenses | ▪ disability status |
| ▪ ADRC involvement | ▪ providing proof of age - 65 or older |

→ Unassigned – Window 6

→ Lobby Lead – The Lobby Lead Agent is responsible for:

- overseeing daily lobby operations;
- responding to staffing issues;
- coordinating with Call Center Administrator(s) when additional staffing support is needed; and
- assisting with language access or service coordination concerns.

DOCUMENT INTAKE AND ROUTING AT WINDOWS 4 & 5

Documents received at Windows 4 and 5 must be reviewed, prepped, and placed in the appropriate designated slot for scanning. The three routing slots are:

- APPs
- ScanFirst
- ProcessFirst

Staff are responsible for ensuring documents are properly prepped and routed to the correct slot to support timely and accurate processing.

APPs Slot - Any PAPER APPLICATION

Use **Blue Separator Sheets** on top of document(s) and between codes, if applicable.

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

ScanFirst Slot - Document NOT PROCESSED

Use **Pink Separator Sheets** on top of document(s) and between codes, if applicable.

ScanFirst Slot - Document PROCESSED

Use **Salmon Separator Sheets** on top of document(s) and between codes, if applicable.

DOCUMENT PREP FOR SCANNING

- ☐ **Date stamp** every page with text (front and back)

First Page must include:

- ☐ (should already be **date** stamped)
- ☐ Document **code**
- ☐ **Case #**
- ☐ **Name of customer**, if applicable (if PIN specific document code)

If a new code within same case:

- ☐ Insert a **separator sheet** before the new document code
- ☐ (should already be **date stamped**)
- ☐ Document **Code**
- ☐ **Name of customer**, if applicable (PIN specific document code)
Repeat until all document codes are added
- ☐ Place color separator sheet on top according to scanning need
 - **APPs**
 - **ScanFirst**
 - **ProcessFirst**

CONFIDENTIALITY AND PROFESSIONAL CONDUCT

Because the lobby is a public-facing service area, staff must take special care to protect customer information.

Front Desk Confidential Area Access

Access to the locked area behind the front desk is restricted to Dane County staff only. This area is designated as a confidential workspace and may be accessed only for official County business.

Employees may not use this space for casual conversation, breaks, or other personal activities. Partner agency staff, customers, and other unauthorized individuals are not permitted in the locked front desk area at any time unless specifically authorized for a business purpose and escorted by appropriate County staff.

Confidentiality

- Confidential information must not be discussed inappropriately in public areas.
- Personal information should only be shared when necessary for business purposes and in accordance with agency policy.
- Staff must remain aware of surroundings when speaking with customers or coworkers in the lobby area.

Professional Conduct

- Conversations at the front desk must remain professional and work-related.
- Staff must avoid discussions that are personal, disruptive, or inappropriate for a public service environment.
- Personal cell phone use for texting, calls, or social media is prohibited while assigned to front desk duties.

SAFETY

- If necessary, contact security guard's cell phone at (608) 220-9081.

If a situation escalates to a risk of staff, clients, or property:

- Press the duress button.
- Call 9-1-1.
- If necessary, leave the area or hide.

LOBBY LEADS

The Lobby Lead plays a critical role in managing the flow, needs, and overall operations of the lobby. They are juggling multiple responsibilities and coordinating support to keep wait times as low as possible. Many customers have already been waiting for some time, so it is essential that staff respond promptly to the Lobby Lead's requests and confirm that you are assisting the customer.

ON-CALL LOBBY (OCL) DUTIES

OCL coverage is assigned to Family and EBD during both AM and PM shifts. However, please remember that you may be asked to assist at JCO depending on lobby traffic while you are on site.

Family OCL Process

Family workers will remain off the phones during their OCL shift and will be assigned Consortium tasks and lists to complete during that time.

EBD OCL Process

EBD workers will complete their protected time (PT) and additional Consortium tasks as needed. During their OCL shift, they are expected to work on their caseload and other Consortium assignments for half of the day. The remaining half of the day will be spent on Genesys.

Each worker is expected to complete the full 2.5 hours of PT. If you finish your PT, you must complete email CC Monitoring and request a Consortium List. If you are unable to complete your full PT, please notify your supervisor.

Use of Language Line or Translation iPads at JCO

While we strive to use our bilingual staff as the first point of contact to provide the best customer service for walk-in customers, there will be times when the use of Language Line or translation iPads is necessary.

If a bilingual worker who speaks the customer's language is not scheduled at the front desk:

- Clerical/CSS staff will enqueue the Lobby Lead for OCL support
- The Lobby Lead will first attempt to assign any available bilingual staff on site who speak the customer's language
- If there is no bilingual worker on site who speaks the customer's language, the assignment will be given to another staff member, who will assist the customer using Language Line or a translation iPad

REMINDER: Employees on site may be asked to assist in the lobby at any time, including during Protected Time for Family workers. Please respond promptly to requests from the Lobby Lead and see the customer as soon as possible—do not delay by researching the case before meeting with them.