

Call Center Anywhere | Standard Practices

1. Call Center Staffing

- EBD workers are scheduled to be on the call center everyday with 2.5 hours protected time as a standard day.
- Family workers are scheduled to be on the call center everyday with 90 minutes protected time as a standard day.
- Consortium staff must log into CCA at the beginning of your work day and stay logged in through your entire work day.

2. CALL FLOW

- When answering a call on CCA each caller should be greeted the same and the CCA agent should be verifying the ID of the caller.

“Capital Consortium, this is (insert your name here), may I have your case number or SSN please?”

After you bring up the case ask, “who am I speaking with?”

After they give their name, ask “can you verify your address and phone number please.”

- Check the Query pages to see what programs are open/recently closed, when reviews are due, and status of each program.
- Read case comments (see below), using hold as needed.
- Resolve the client’s concerns using First Contact Resolution.
- If you need to transfer the caller to another queue in CCA, advise the client that you will be transferring them to another worker and that they may experience a brief hold.
- As a wrap up, ask if the client has any other questions today.
- Thank the client for calling and end the call, making case comments about the call and actions taken

3. First Contact Resolution

Use “First Contact Resolution” while on CCA.

The goal of “First Contact Resolution” is to properly address the customer's need the first time they contact the agency, including anticipating future needs, thereby eliminating the need for the customer to follow up with a second contact. This means putting yourself in the customer shoes, how could you give them the best experience. The following are some examples but not an all inclusive list:

First contact resolution at the Capital Consortium:

- Process all documents, SMRF, Renewals, Changes, and any other banner items
- Always collect Telephonic Signature during phone interactions
- Process all Discrepancies, and other work items
- Program adds

- Complete Baby and Person adds
- Complete RFA to set FS filing date if customer cannot stay on the phone to complete the full application interview
- New FS and HC request
- Complete missed intake and review appointments
- Complete FS interviews
- Check to see if a renewal is due soon for the case you are accessing. You may be able to take care of the renewal with the customer now and reduce repeat calls for the same case
- Sync reviews dates when possible

****The list above is not all inclusive. Workers need to look at the entire case, and use their critical thinking skills to determine what is needed on the case, so the caller will be satisfied and not need to call back again***.*

4. Corrections/Errors/Policy Interpretation

If staff find an error on a case, they should correct the case going forward. If the previous worker made an error, staff should notify his/her supervisor for follow up.

5. **Staff must be logged into CCA all day** Staff are expected to be logged into the call center at all times, whether they are assigned to the phones or not. This allows for customer calls to be transferred when appropriate such as complex LTC and Family Care calls. This also allows for easy access to recording for telephonic signatures.

6. Requests for a worker's phone number or email

When a customer requests their worker's phone number or e-mail, staff should ask the customer what else they need help with. If the customer insists on speaking to their worker directly or a supervisor, escalate this customer to the Helpline lead worker. (If a customer is insisting on contacting their worker, the issue has probably risen to the level that a lead or supervisor should be involved.)

7. Confidential Cases Exception

- **CCA worker** - if the caller's case has been made a "confidential" case. The CCA worker will view the CWW Case Summary page to find the assigned worker to the case. The CCA worker will send an email to the assigned worker and cc #HS EA Capital Leads HSEACapitalLeads@countyofdane.com with the following information:
 - ✓ Subject line: County/Confidential
 - ✓ Body of email: Customer name, case number, the phone number and best time to call back.
- **Assigned worker** – After the assigned worker received the email from a CCA worker requested a call back to the confidential case PP. The assigned worker must call the customer back within 24 hours and during the worker's CCA shift.

8. Escalated Procedures for Complicated Case Caller

Helpline is open from 8:00 AM – 4:00 PM to assist staff on policy, system and case processing issues and to take on escalated customers. Helpline is open from 4:00 – 4:30 PM for escalated customers only.

- CCA worker
 - ✓ Do your best to assist customers according to program policy.
 - ✓ Remind the customer of their rights, the fair hearing process and offer it when appropriate.
 - ✓ If customer continues to be unhappy, place customer on hold.
 - ✓ Call the Helpline number to inform the lead about the situation.
 - ✓ Use CCA to do a direct transfer of the caller to the lead you just spoke with.

- Helpline Lead
 - ✓ Helpline leads will serve as the first line of defense for any complicated CCA caller.
 - ✓ Helpline lead will use their discretion to escalate caller to a supervisor when necessary.

9. When to direct callers to their local agency

Please direct CCA callers to the local agency for the following reasons only:

- Applications (if requested)
- Vault cards
- Drug screen (only if agency completes them)
- Good Cause Claim (to have signature witnessed, if not notarized)
- Verification is due the same day (needs date stamp) when other options are unavailable (fax, upload in ACCESS)

10. Customer Resides in another Consortium

If a customer calls the Capital Consortium and actually resides in another Consortium, please **DO NOT** transfer them to the other Consortium. You should give them the correct phone number to their Consortium, but never transfer their call directly to the appropriate Consortium.