Department of Health and Human Services: MC311 Data Review

2/22/2011
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CountyStat

CountyStat Principles

- **Require Data-Driven Performance**
- **Promote Strategic Governance**
- **Increase Government Transparency**
- **Foster a Culture of Accountability**

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Agenda

- **HHS/ MC311 Transition Overview**
- **Review of HHS Related Customer Request Data**
  - Customer Request Intake Method
  - HHS Customer Request Volume
  - Customer Requests by Call/Web Portal Type
  - Customer Requests by Area Type
  - Manna Food Referral Volume
  - Customer Requests by Top Sub Areas
- **HHS Process for Closing Tickets**
- **Review of County Current HHS Phone Numbers**
- **Improving Existing Practice**
  - HHS Recommendations
  - CountyStat Recommendations
- **Wrap-Up and Follow-Up Items**

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MC311 Nomenclature: Categorizing Customer Intake

A Customer Request in MC311 is simply a record that is created when a resident contacts the 311 Call Center requesting service.
(Customer Requests were previously called "service requests".)

The types of MC311 Customer Requests can be categorized as follows:

General Information (GI): These calls typically constitute 50% of a Customer Service Center's (CSC) calls and deal with responses to Frequently Asked Questions (FAQs); provide static information about policies and procedures, County government events, and operations.

Referrals (REF): These calls typically constitute 25% of a Customer Service Center's calls and provide constituents with the telephone number for a call requiring "subject matter expertise" and perform a "warm transfer" of the call, if required.

Service Requests (SRs): These calls typically constitute 20% of a Customer Service Center's calls. A service request is created for a department to fulfill a resident's request.

Miscellaneous Comments / Compliments / Complaints: These calls typically constitute 5% of a Customer Service Center's calls and typically document the nature of the comment, compliment, or complaint and are visible to the specific department.

The use of the term "Service Request" to categorize multiple types of interactions within MC311 was a cause of confusion, thus the totality of all interactions are now categorized as "Customer Requests."

HHS Transition to MC311

- In November 2008, HHS call center manager joined MC311 as subject matter expert.

- On November 4, 2009, four of five HHS staff authorized for the move went to MC311 from HHS.

- Transferred staff previously staffed our main HHS Information and Referral Line.

- Beginning with a soft launch on January 11, 2010, MC311 answers calls from the public, including those who dialed the defunct HHS I&R line, seeking information and referral for their health and human service needs.

- Where possible, based on information provided by HHS, MC311 staff handle the call, or refer it to one of the former HHS I&R staff trained (Tier 2) to work with HHS callers.

- Calls that require a further response are referred to the appropriate program staff within HHS.

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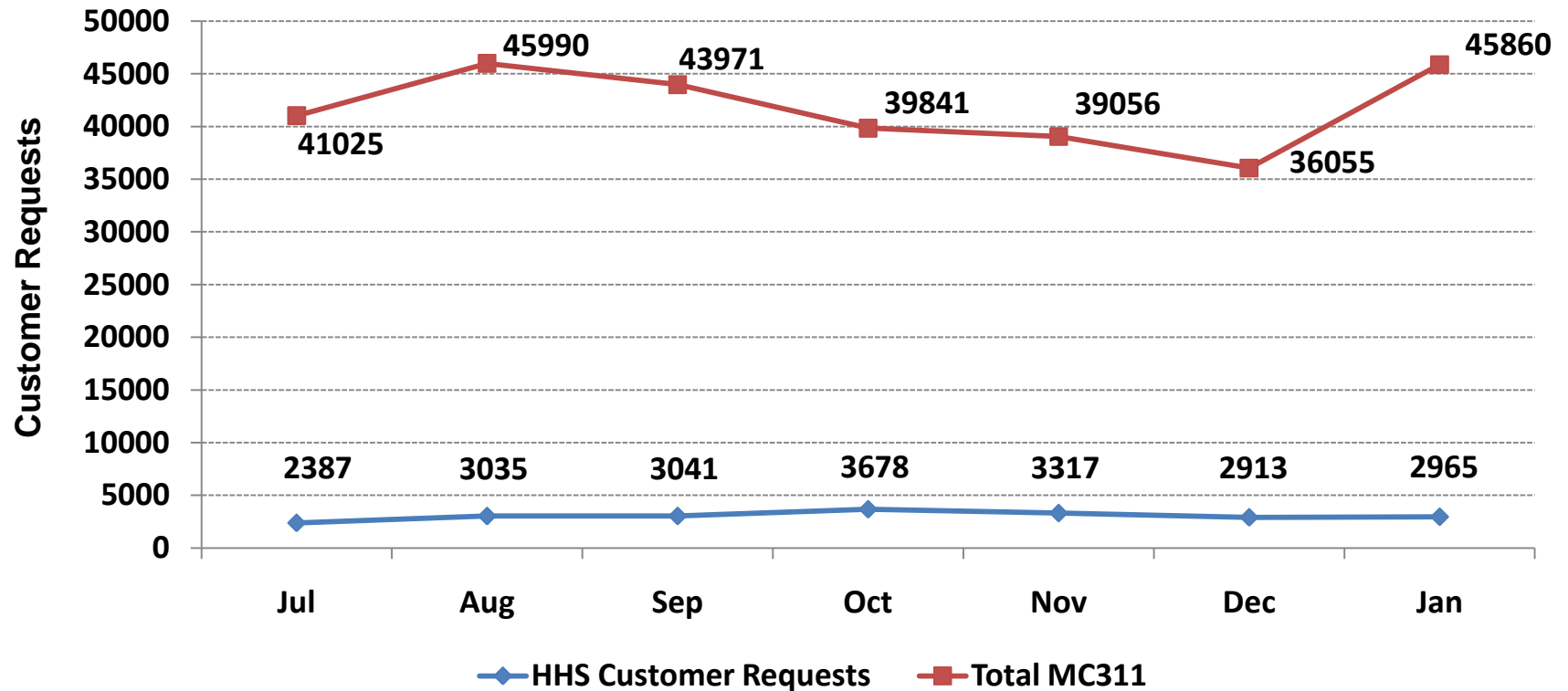# HHS Monthly Customer Request Totals

Customer Request Totals
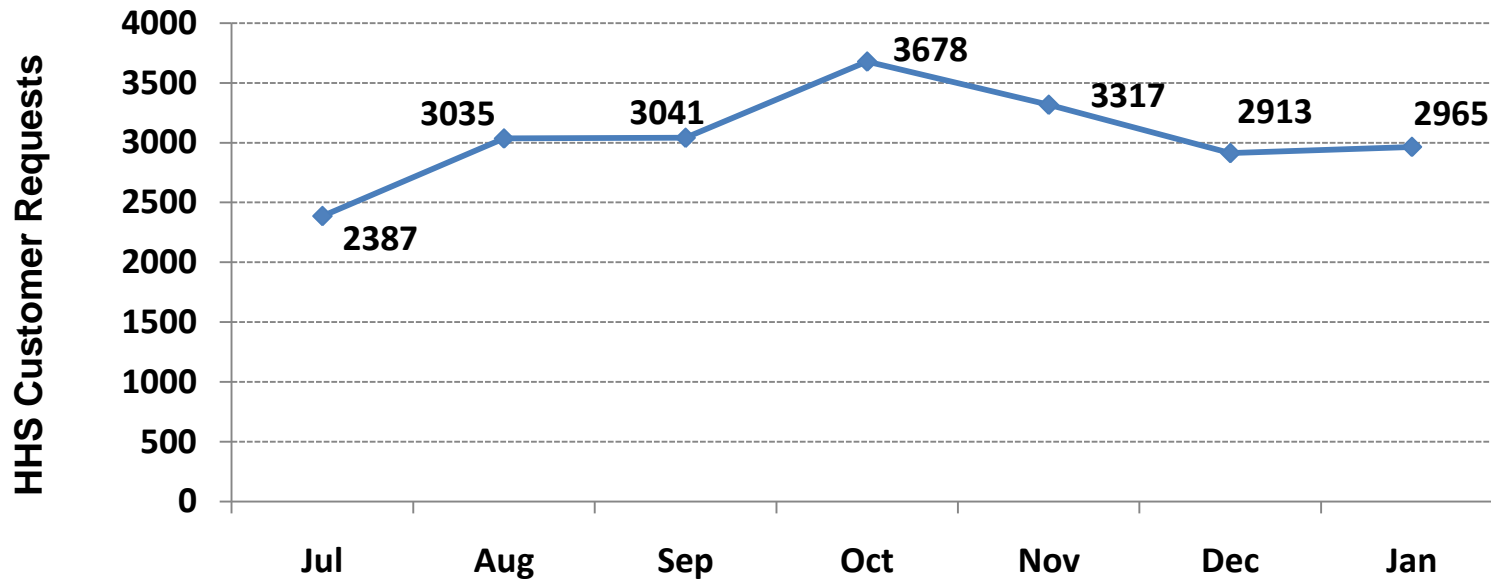
	July-Aug	Aug-Sep	Sep-Oct	Oct-Nov	Nov-Dec	Dec-Jan	July-Jan
Percent Change	27%	0.2%	21%	- 9.8%	- 12%	1.8%	24%

HHS Related Customer Requests as Percentage of Total MC311 Customer Requests

	July	Aug	Sep	Oct	Nov	Dec	Jan
HHS as Percent of Total	6%	7%	7%	9%	8%	8%	6%

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HHS Monthly Customer Request Totals by Type

	July	Aug	Sep	Oct	Nov	Dec	Jan	Avg.	Grand Total
Complaint/Compliment	12	4	11	12	7	4	0	8	50
General Information	1,201	1,634	1,879	2,209	1,911	1,643	1,535	1,716	12,012
Referral	957	1,185	931	1,209	1,071	1,020	1,173	1,078	7,546
Service Request - Fulfillment	217	212	220	248	328	246	257	247	1,728
Grand Total	2,387	3,035	3,041	3,678	3,317	2,913	2,965	3048	21,336

General Information and Referrals account for 92% of all HHS Customer Requests.

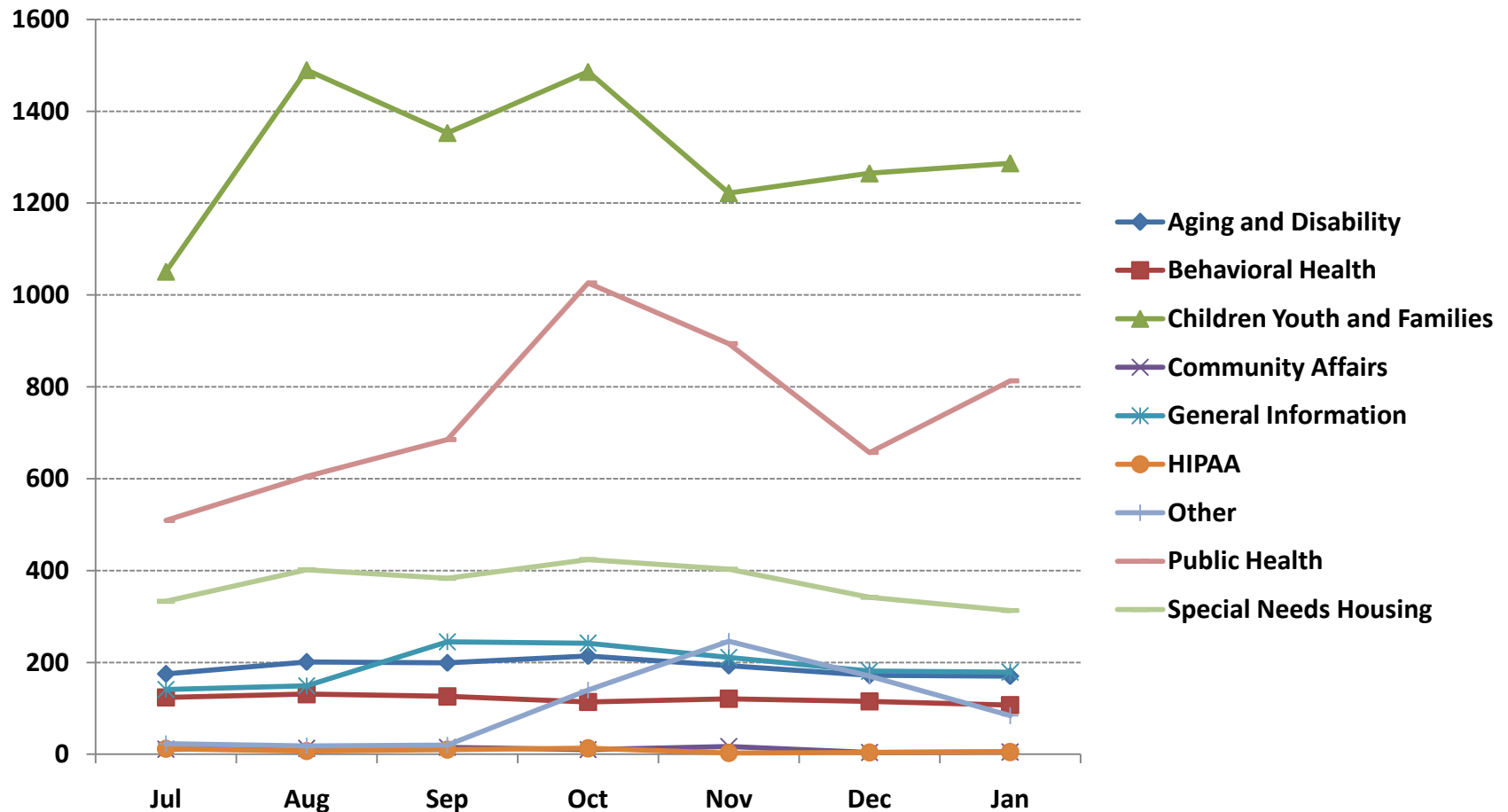CountyStat

HHS Monthly Customer Request Totals by Type

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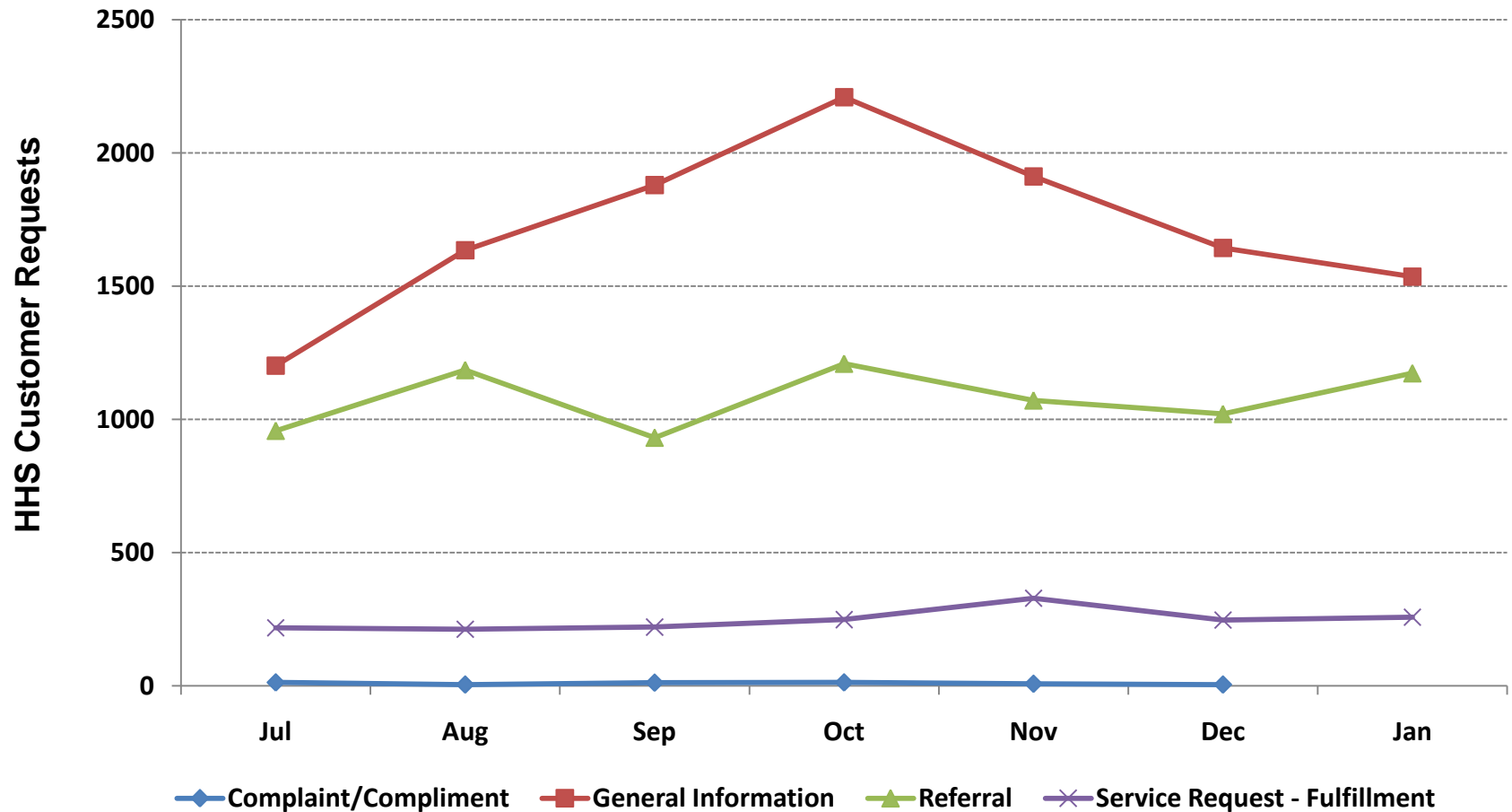
HHS Monthly Customer Request Totals by Area Type

	July	Aug	Sep	Oct	Nov	Dec	Jan	Avg.	Grand Total
Aging and Disability	175	201	199	214	193	172	170	189	1,324
Behavioral Health	124	131	126	114	121	115	107	120	838
Children Youth and Families	1,051	1,490	1,353	1,486	1,222	1,265	1,287	1,308	9,154
Community Affairs	11	13	15	10	17	4	5	11	75
General Information	141	149	245	242	211	181	179	193	1,348
HIPAA	12	7	10	13	3	4	5	8	54
Other	23	18	20	140	246	170	84	100	701
Public Health	509	605	685	1,026	894	657	813	741	5,189
Special Needs Housing	333	402	383	424	403	342	313	371	2,600

* Does not include following Area Types with negligible amount on entries (Information Request, Non Profit Groups, 'Blank')

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HHS Monthly Customer Request Totals by Area Type

Legend:
- Aging and Disability
- Behavioral Health
- Children Youth and Families
- Community Affairs
- General Information
- HIPAA
- Other
- Public Health
- Special Needs Housing

Children Youth and Families, and Public Health areas account for 67% of all HHS Customer Requests.

* Does not include following Area Types with negligible amount on entries (Information Request, Non Profit Groups, 'Blank')

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HHS Monthly Customer Requests Totals by Children Youth and Families Area Type

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Total
Child Care Resource Center	33	26	25	27	24	27	31	193
Child Care Subsidy Program	186	334	259	185	182	172	139	1,457
Child Foster Care	2	15	10	9	8	5	9	58
Child Protective Services	40	38	37	35	34	41	58	283
Child Link/Early Childhood Svcs	38	69	38	32	12	31	19	239
Conservation Corps	1	2			1		1	5
Gang	1	3	3	3	1	1	1	13
General Information				1			1	2
Income Supports	739	994	969	1,183	947	975	1,017	6,824
Other		1	1	2	4			8
SASCA	8	5	7	7	7	8	10	52
(blank)	3	3	4	2	2	5	1	20
Grand Total	1,051	1,490	1,353	1,486	1,222	1,265	1,287	9,154

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HHS Monthly Customer Requests Totals by Children Youth and Families Area Type
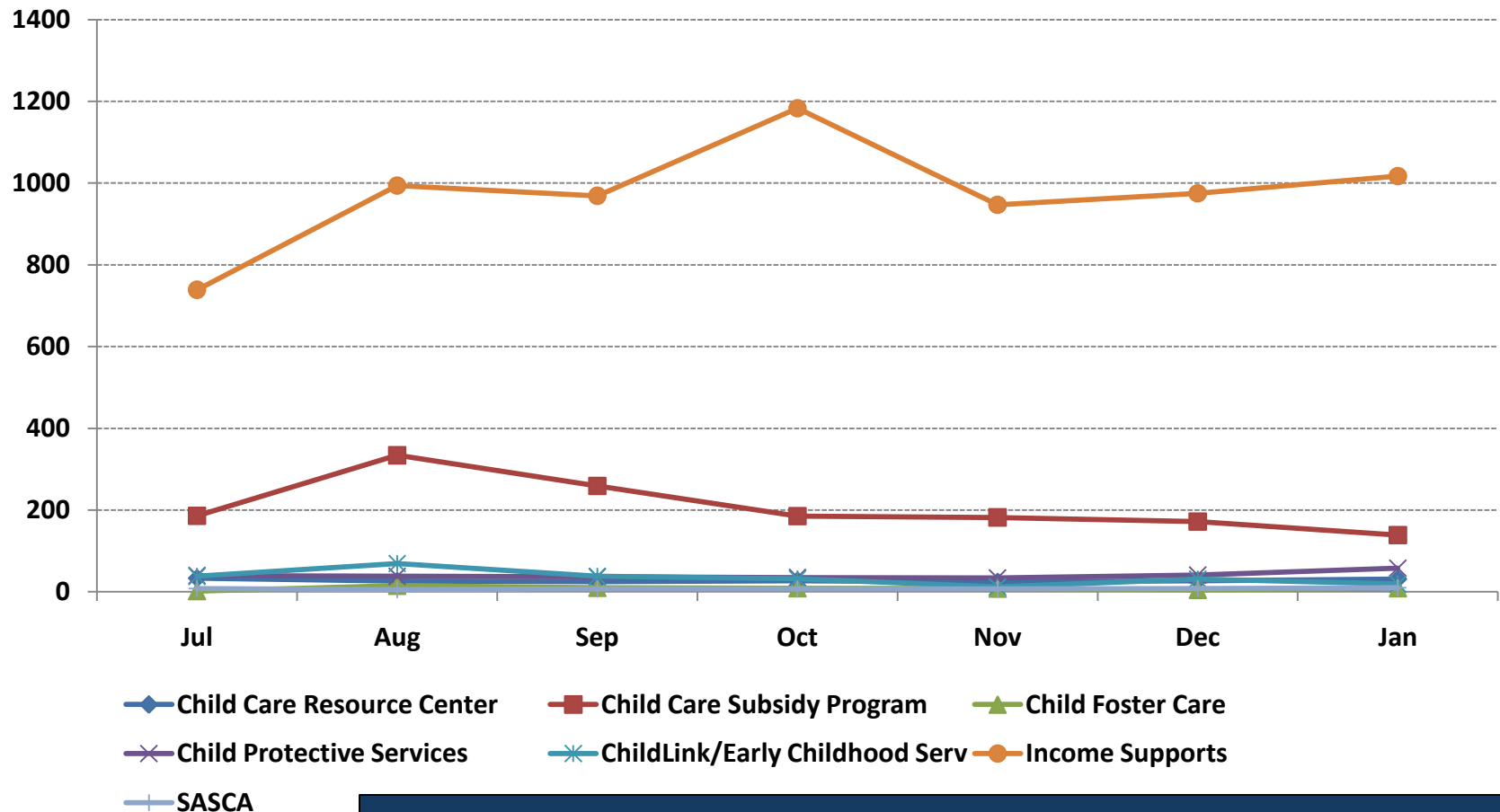
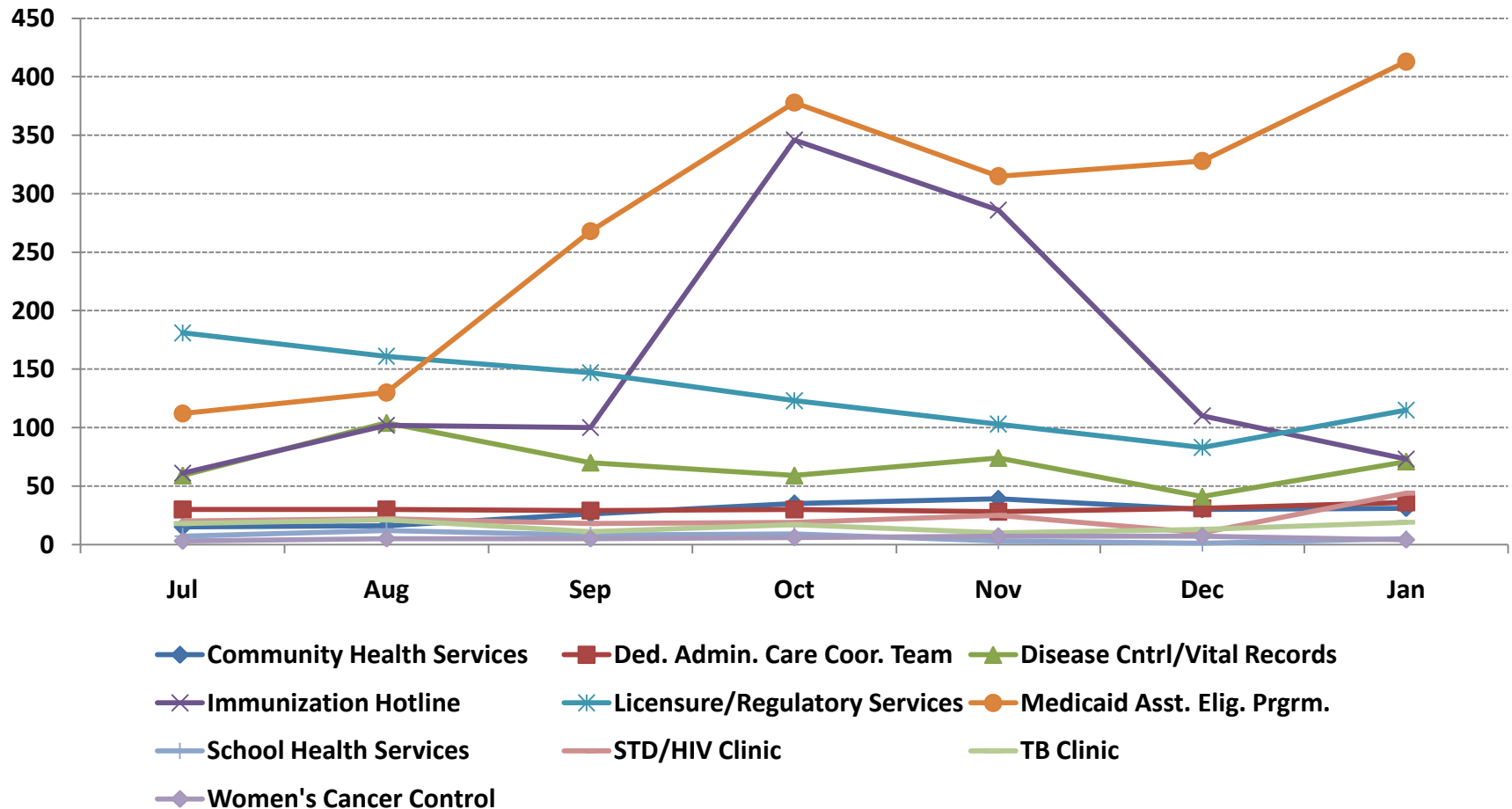**Income support calls account for 75% of all HHS Children Youth and Families Customer Requests.**

* Does not include sub areas with less than 30 total entries.

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HHS Monthly Customer Requests Totals by Public Health Area Type

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Total
Birth/Death Records					1		1	2
Community Health Services	15	16	26	35	39	30	31	192
Ded. Admin. Care Coor. Team	30	30	29	30	28	31	36	214
Disease Cntrl/Vital Records	59	104	70	59	74	41	71	478
Environmental Health	1							1
General Information						1		1
Health Care Facility		1	1			1		3
Immunization Hotline	61	102	100	346	286	110	73	1,078
Licensure/Regulatory Services	181	161	147	123	103	83	115	913
Medicaid Asst. Elig. Prgrm.	112	130	268	378	315	328	413	1,944
Other	1	1	2	3	3	1	1	12
School Health Services	7	12	8	9	3	1	5	45
Shaken Baby/Fam. Violence Prev	1			1				2
STD/HIV Clinic	20	22	18	19	25	10	44	158
TB Clinic	18	21	11	17	10	13	19	109
Women's Cancer Control	3	5	5	6	7	7	4	37
Grand Total	509	605	685	1026	894	657	813	5,189

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HHS Monthly Customer Requests Totals by Public Health Area Type

Community Health Services — **Ded. Admin. Care Coor. Team** — **Disease Cntrl/Vital Records** — **Immunization Hotline** — **Licensure/Regulatory Services** — **Medicaid Asst. Elig. Prgrm.** — **School Health Services** — **STD/HIV Clinic** — **TB Clinic** — **Women's Cancer Control**

Immunization and Medicaid account for 58% of all HHS Public Health Customer Requests.

* Does not include sub areas with less than 30 total entries

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HHS Manna Food Referral Overview

- **Manna Food Center is the main food bank in Montgomery County**

- **Montgomery County Government serves as the de facto referral agency**
  - According to Manna's website, "The phone number for the Montgomery County Department of Health and Human Services Information and Referral Line is **240-777-1245**. They can provide you with a Manna referral as well as many other services.

- **Besides Montgomery County Government, there are 360 additional referral agencies**
  - According to Manna's website, "You can also get a referral to pick up food from Manna from any of the 360 Referral Agencies that work with Manna."

Manna customer requests are discussed in this presentation because they are consistently amongst the top-20 solution areas on a weekly basis and require HHS support.

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MC311 Manna Food Center Referral Process (English)

- Caller calls in requesting a Manna food basket or they say they need food.
- CSR asks customer if they have ever been to Manna before. If yes, CSR asks if they have been within the last 30 days. If yes, they are told they must wait 30 days before their next referral and customer is not transferred to HHS and the service request is closed.
- If customer has never been to Manna or they have not been to Manna within the last 30 days, they are transferred to HHS and the service request is closed.
- If customer is eligible, caller is transferred to responsible employee at HHS. Customer may receive voice mail.
- HHS employee tells customer to go to the pick up site on the requested date (usually it's the next day) and the correct time, and to bring a photo ID.
- The customer goes into Manna at the specified date and location to pick up food.

Process Flow Chart

——— = Telephone Interaction

Caller → MC311 CSR → HHS → Manna

If Caller Not Eligible
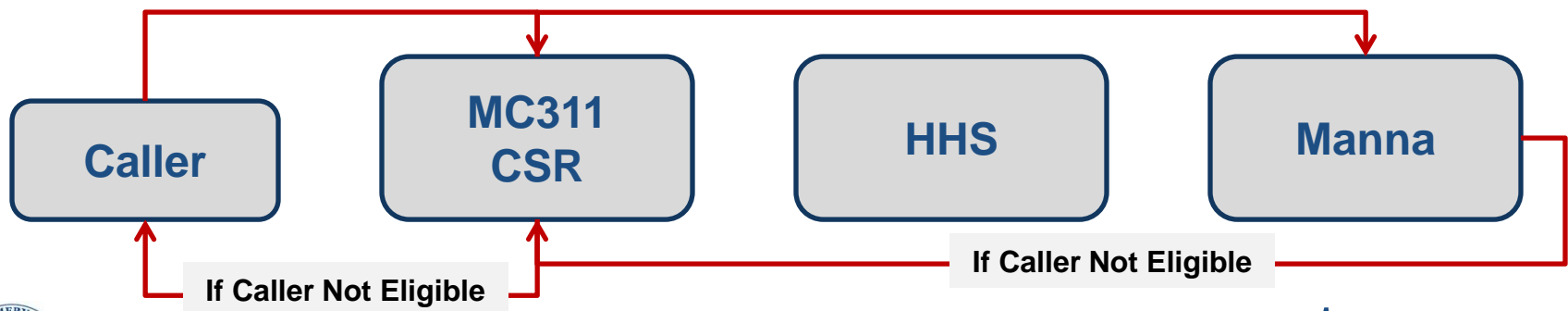
If Caller Not Eligible

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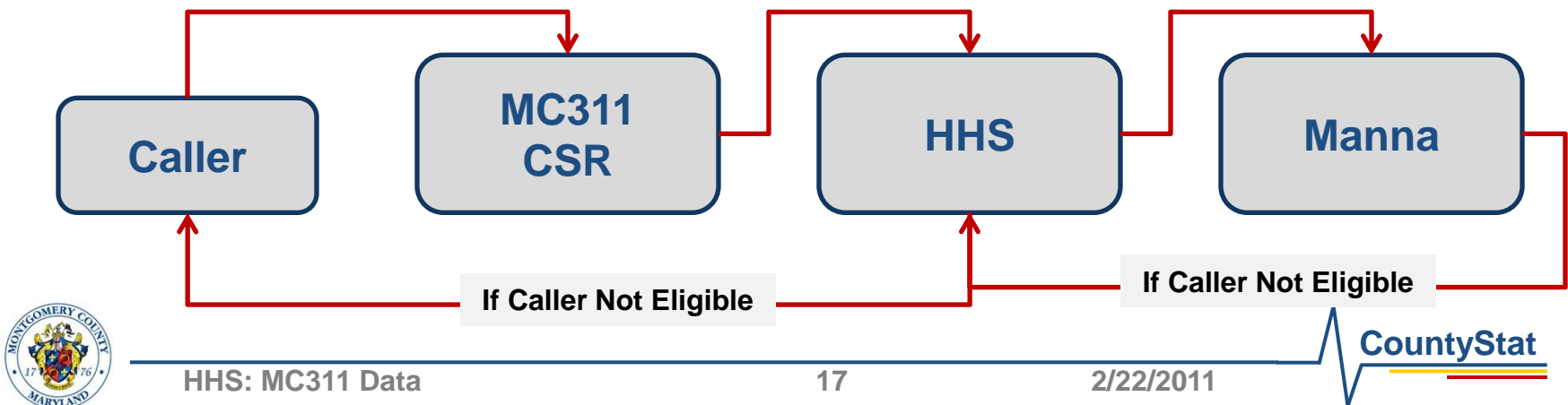
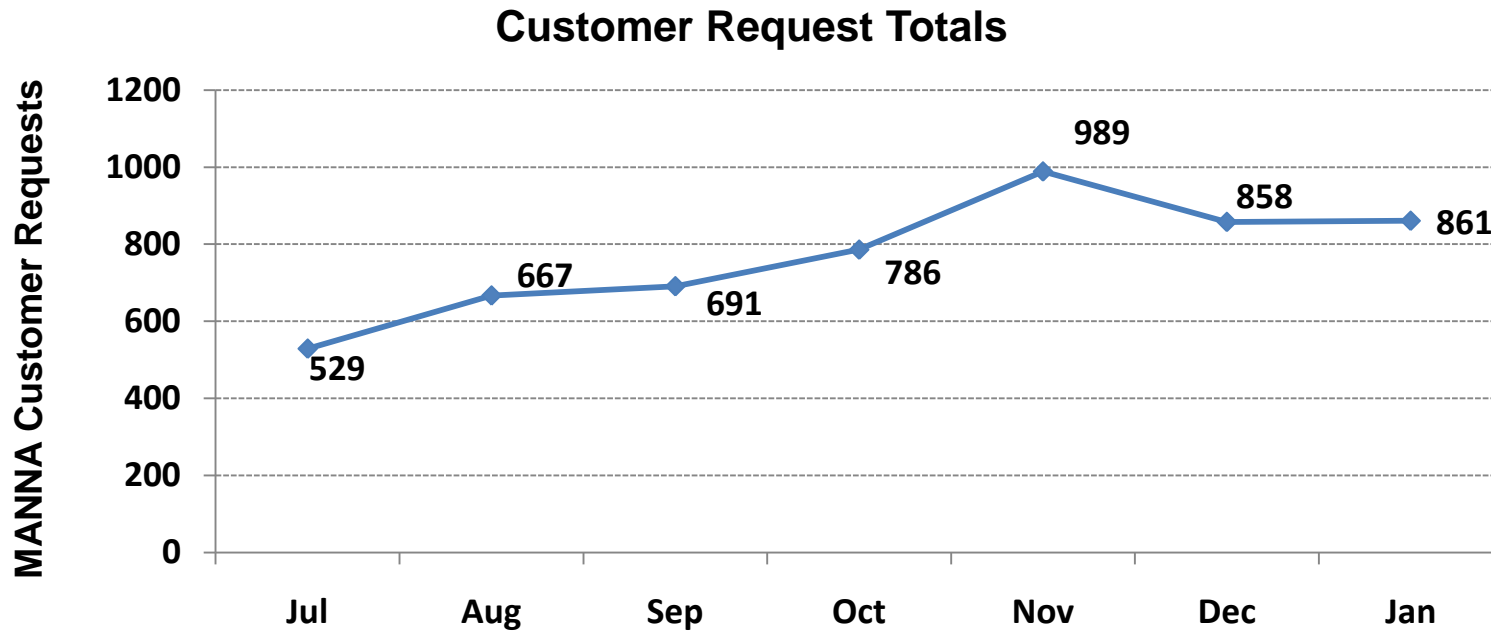# MC311 Manna Food Center Referral Process (Non-English)

- If caller speaks Spanish or another language other than English, the CSR transfers customers to an HHS Tier II Customer Service Rep (CSR).

- HHS Tier II CSR will either speak to the person in their native language (Chinese and Spanish) or engage language interpretation services.

- HHS Tier II CSR determines Manna eligibility. No referral made if the customer is ineligible and the service request is closed.

- If customer has never been to Manna or they have not been to Manna within the last 30 days, the CSR asks for qualifying information.

- HHS Tier II CSR either calls in referral to Manna or faxes referral to Manna. If Manna notes that customer is ineligible because they have received a basket within the last 30 days – Manna will call the CSR who made the referral. The CSR then contacts customer to inform in ineligible status.

- The customer goes into Manna at the specified date and location to pick up food.

Process Flow Chart

━━━ = Telephone Interaction

Caller

MC311 CSR

HHS

Manna

If Caller Not Eligible

If Caller Not Eligible

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Manna Customer Request Totals

Customer Request Totals

	July-Aug	Aug-Sep	Sep-Oct	Oct-Nov	Nov-Dec	Dec-Jan	July-Jan
Percent Change	26%	4%	14%	26%	- 13%	0.3%	63%

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Manna Related Customer Requests as Percentage of Total MC311 Customer Requests
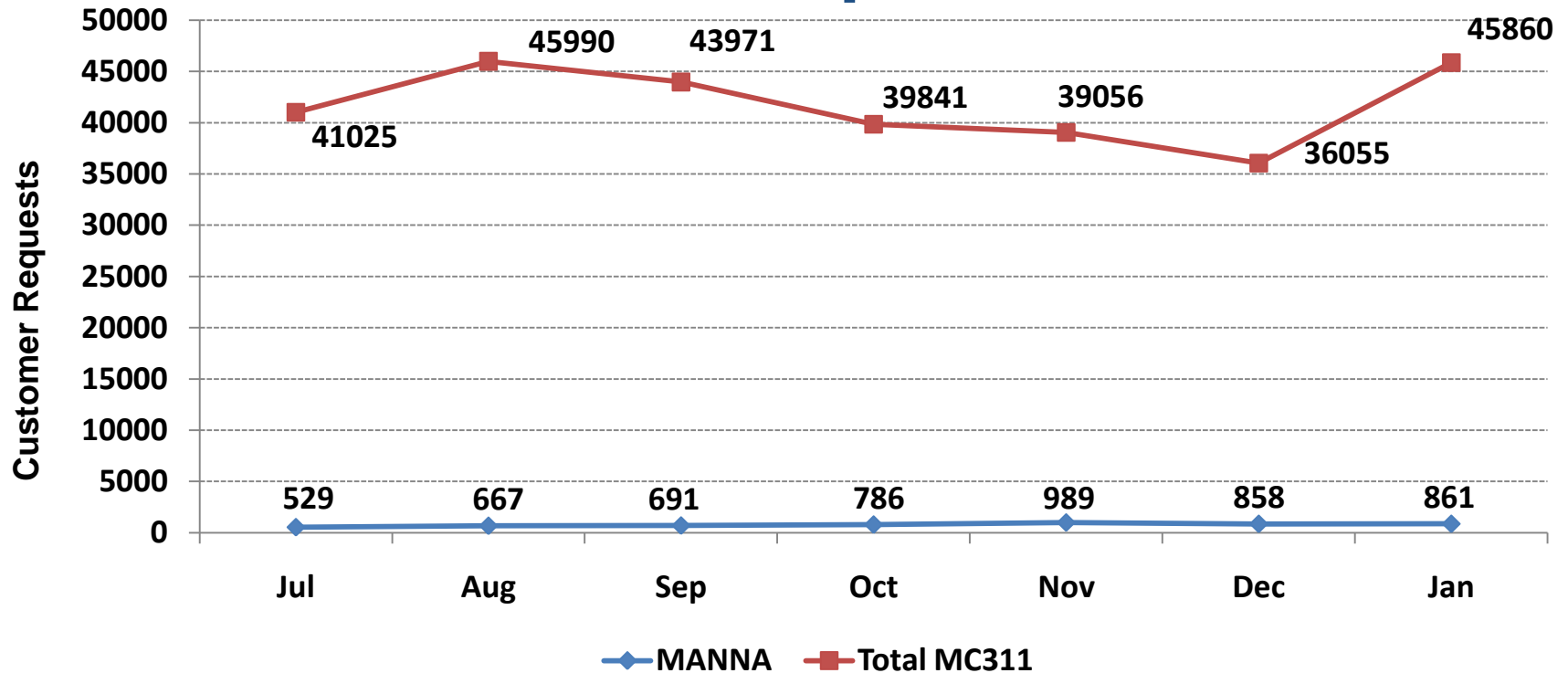
	July	Aug	Sep	Oct	Nov	Dec	Jan
Manna as Percent of Total	1%	1%	2%	2%	3%	2%	2%

Combined with Manna requests, HHS accounts for an average of 9% of all MC311 Customer Requests.

Customer Request Intake Method for HHS Related MC311 Customer Requests

Phone calls are the most frequent avenue for HHS-related Customer Requests

HHS Non-Manna	July	Aug	Sep	Oct	Nov	Dec	Jan	Grand Total
Internal	15	31	14	21	27	19	15	142
Phone	2,372	3,004	3,026	3,655	3,286	2,894	2,950	21,187
Web			1	2	4			7

Manna	July	Aug	Sep	Oct	Nov	Dec	Jan	Grand Total
Internal	1	2	3	1	3	2	4	16
Phone	528	665	688	785	986	856	857	5,365

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Process for Closing HHS Service Requests

HHS feels the duration of their existing business practices necessitate the closure of tickets once the appropriate referral is completed.

- HHS closes service requests at the point that service is started or direct answer is provided to the customer.

  For example: A customer calls with a request for services. Once HHS receives the service request, they forward all necessary information to the appropriate HHS staff and then close the request.

	July	Aug	Sep	Oct	Nov	Dec	Jan
Average Service Requests Handled by HHS	217	212	220	248	328	246	257
Average Days to Close a HHS Service Request	5	2	1	1	1	1	0

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Status of Existing HHS Phone Numbers

HHS currently has 50 advertised phone numbers (non-TTY) that are not forwarded to MC311.

- In some instances existing phone numbers, advertised on the HHS website, are no longer actively monitored and instead have a voice mail directing callers to dial 311.

  For example: If a customer calls the Immunization and Lead Outreach Line(240-777-1050), they receive a voice mail, in both English and Spanish, directing the caller to hang-up and call 311 to speak with a customer service representative.

	24 Hour Access	Separate Line Req'd by Law	Handles HIPAA Information	Actively Monitored by Call Taker	Staffed by Contractor*	Staffed by HHS*	Planned Migration to MC311
Number of HHS Phone Numbers with Identified Characteristic*	7	7	30	35	7	33	0

*These fields are not mutually exclusive. Some lines are staffed by both HHS staff and contractor staff.

**96% of phone lines reported data to CountyStat as of 2/18/2011.

HHS Reflections on Improving Existing Practice

- Gap in capacity to connect HHS consumers to Community Based Organizations - many HHS services are provided on contract with community partners or as a non-profit service offering. The HHS internal Information and Referral line provided information and referral both within County government and to community partners.

  - That capacity was lost in the move to MC311 which refers only within County government with the partial exception of MANNA food. HHS has no capacity to fill the gap and is therefore unable to provide this important customer service to callers. This is why having 211 capacity in Montgomery County is so important for HHS.

- MANNA food referrals are critical and time sensitive to low income families. MC311 handles Spanish referrals and HHS has a former I and R specialist handling the English speaking calls. When that individual is out of the office, HHS needs backup support from MC311 to cover MANNA calls.

HHS Reflections on Improving Existing Practice

- Track data to determine if more HHS related calls can be completed by MC311 as opposed to referring them back to HHS as service requests.

- Migrate only phone lines that have information and referral as the primary purpose.

- Engage Ms. Bell-Pearson in a review of current HHS related MC311 activities to ensure that we are compliant with privacy and confidentiality statutes

CountyStat Reflections on Improving Existing Practice

- Where appropriate, combine existing phone numbers by functional area in order streamline customer intake

- Create a strategy for migrating all eligible existing HHS phone numbers to MC311

- Determine appropriate level of effort for supporting non-governmental call volume

- Examine opportunities for expanding customer use of the MC311 web portal for leveraging HHS services

Wrap-Up and Follow-Up Items

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