

Improving Staff Efficiency

InTelegy has been working with government agencies to improve the delivery of services for over 15 years. InTelegy's focus is "Creating Intelligent Client Experiences" through increasing staff efficiency and improving the experience clients have with your organization. The delivered solutions are straightforward at the conceptual level:

1. Create a distributed work environment by changing service delivery from a 1:1 caseworker-to-case environment to a distributed 1:many caseworker-to-case environment where the client is offered many channels of access and the client needs are met by the next available worker. It is no longer "my" client; it is now "our" client.
2. Segment the customer base to provide the right level of service to match the needs and requirements of each specific customer type.
3. Eliminate the duplication of efforts and streamline handoffs. Given the longevity of the program, as well as the many programmatic and policy changes that occur, there is an easily-identified duplication of efforts and a lack of clarity at key handoff points (either knowingly or unknowingly) embedded in procedures that, when removed, will increase staff efficiencies.
4. Implement self-serve technologies: By automating information access and offering access to their case details, the client can partake in self-service at times more convenient to them. Self-service options also help eliminate the bottleneck of the caseworker as a human 411 and keeper of case information.

Although the business model and procedural changes may be clear at the conceptual level, collaborating and creating change is very difficult at the operational level. It is even harder in a day-to-day operating environment to ensure that those business process changes do not migrate back to the "old way of doing things" over time.

It quickly became clear that the county agencies needed a technology tool that could be configured to meet their unique county operational processes, as well as ensure that the operational process changes remained and "standard business processes" became the norm.

The existing State case management systems are not built with efficient workflow in mind. By design, case management systems effectively store case information, track program outcomes, and provide a repository for work (applications, documents, located contacts, renewals) that is then distributed to an office, county, or city to be completed. In an era of scarce resources, utilizing large case management systems that customize workflow management is an imperative to increase staff efficiency. To solve this, InTelegy partnered with many great minds from our various county partners and created the Workload Management Tool (WMT). WMT

WMT helps maximize staff resources through: Standardized Workflows, Prioritized and Equalized Work Distribution, and Data-Driven Management

helps standardize, automate, and integrate the new business processes. Workload management is a new reality in government programs requiring public interface. The WMT is an overlay to existing case management systems that results in a better utilization of existing staff resources.

Maximizing Staff Resources

The promise of the Workflow Management Tool (WMT) is to recognize and organize workload, evenly and fairly distribute that workload, standardize how it is being completed, as well as track (who and how) the work gets completed every step of the way – in REAL time. The desired result is to maximize staff resources and reduce the time it takes to process applications and manage cases.

Standardized (and Customized) Work:

By standardizing how work is performed, WMT will track and measure activity down to the individual level. The visibility of work being performed automatically increases the level of productivity, eliminates wasted time on non-priority activities, and gives management a tool to analyze their team's work for continuous improvement. The work standardization can be

customized to accommodate the different business processes of an office or county. Once standardized, tips and training, as well as easy access to update and view policy and procedure guidelines, reduce the time it takes to accomplish a business process.

Prioritized and Equalized Work Distribution:

With more cases than caseworkers to complete the work, focusing on the right cases to increase collections and meet application deadlines, as well as focusing efforts on the neediest, is critical. WMT automates this process and eliminates the multiple macros, queries, and excel spreadsheets by downloading data into an accessible database on a daily basis. By identifying the priority segments into work units and allocating the staff by those segments (in comparison to alpha case assignment), a caseworker is presented with their prioritized work daily. Automating this prioritization saves both the supervisor and the management time with multiple queries and, therefore, puts more caseworker hours towards working cases rather than spending valuable time determining what case to work.

Data-Driven Management:

By standardizing work into phases and action steps, the operational teams will be able to analyze the incremental operational steps it takes to increase productivity. WMT also allows for the ability to track what stage the cases are struggling and, therefore, where to focus efforts. Each phase and action step is a data point and can be measured. A Child Support example: *An establishment work unit may have the NCP interview as a phase. With WMT, a manager can look and determine “of the cases that have stipulated court orders, how many of them actually conducted a live interview.” Or, “of the full pay cases, what percentage of these cases attended a post order intervention/educate meeting?” Understanding data at the operational level puts the power of real-time data (compared to month-old/historical data) in the hands of the staff that can impact the results today.* The WMT drives data down to the operational level and impacts caseworkers’ ability to meet and increase collections efforts, as well as State Outcomes.

The Workflow Management Tool (WMT) is NOT a task tool. WMT facilitates shared resources in both a distributed work (task) and a case-based environment. WMT automates the

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intelligence of a caseworker yet allows the work of a case to be distributed and worked by the most skilled worker for the specific task at hand. For example, a renewal may have an application review, verification documents, and a phone interview that needs to be conducted, all occurring at different times. They can or cannot be performed by different people. The WMT tracks and flows this work to completion so that the client experiences a continuity of information and the case worker maintains control of all the related activities and tasks required to complete that process for the client. A task system treats these all as separate and unrelated tasks often resulting in duplicate work, a frustrated client, and a staff unable to be accountable to the work being performed.

Tulare County

In 2015 Tulare County Health and Human Services had over 700 workers processing approximately 12,000 tasks per month for approximately 95,000 families. The case management system was over 10 years old and was built to be a customer record and eligibility determination system. Tulare implemented several work-around tools to assist with the management of the workload, including a homegrown “task-in, task-out” task management system. The case management and task system together presented several issues in workload management, including:

- Tasks were difficult to prioritize
- Task assignment was complex and relatively manual
- Related tasks could not be grouped together and multiple related tasks could not be assigned to a worker (all tasks were treated separately, resulting in many tasks per worker)

White Paper – The Workload Management Tool Imperative

- No visibility to volumes of work per worker
- Querying the system slowed it down for all users
- No real-time view of staff workload and progress against work volumes was unavailable to supervisors
- Work flow was individual and not standardized (each worker performed their work and used the task system differently)
 - No data available on how, how long, and what happened with each task
 - No ability to analyze work flow, operational phases, or action steps to determine how work gets done
 - No continuous improvement data

“Besides staff efficiencies and improved workflow management, WMT gives us a built-in time study so that we know how to accurately allocate work to the correct programs.”

- Vienna Barnes, Tulare County Deputy Director

Impact: It was estimated that, before the implementation of WMT, more than 30 minutes per day per worker could be attributed to these ease-of-use issues. Therefore, approximately 10 hours per month per worker were wasted with workers figuring out where to start. With 700 workers, that is 7000 hours per month or 43 FTE’s spent on workload issues that could be drastically reduced and/or eliminated with an effective workload management tool.

Additionally, eliminating the manual task assignment process completed by a clerical team and the maintenance of staff availability in manual spreadsheets by supervisors was estimated to save more than 4 days per month or 12 days of clerical time per year.

Tulare County Implements WMT:

Tulare County implemented WMT in 2018 and is already seeing increases in worker morale. By grouping the same case tasks together, there has been a reduction in the sheer quantity of tasks. Workers now have more control over their work due to the visibility of work on-hand and their ability to prioritize. Supervisors have more visibility of work being done, as they value and use the real-time data on workload across their team and their units. Yet, the

most important impact is the impact on the client. More applications and renewals are now being processed within the state-mandated timeframes for each program. The workers are utilizing the more efficient workflow management processes to improve the client experience. Clerical time in task assignment has been dramatically reduced. They now have time to take on other responsibilities without increasing the clerical headcount.

Placer County

Placer County implemented WMT in 2016. They reported that prior to WMT, 30% of the applications were processed within the state-mandated guidelines. Today, 60% of applications are processed within target timeframes. Before WMT, Placer County averaged 455 tasks per worker per month. With the WMT work unit model, Placer County averages approximately 81 work units per worker per month. Work units minimize assignments to workers, worker stress is minimized, and overall work is more streamlined and easier to manage. In the first 6 months of implementation, Placer County realized a 15% reduction in overdue work. Organization and prioritization impact staff productivity: Before WMT, about 30 minutes per day per worker were spent sorting and organizing work. What may not seem like much really adds up: 10 Hours per Month per Worker x Total # of Workers = Total # of Hours per Month OR Total FTE.

Task Assignments are a heavy workload on supervisor and clerical teams: Eliminating the clerical team’s manual task assignment process and eliminating the supervisor’s maintenance of staff availability in manual spreadsheets was estimated to save more than 4 days per month.

The InTelegy Workload Management Tool is helping government agencies to become more efficient and data-driven while also improving the customer experience. By leveraging the old case management technology with modern software supporting the flow of work, both the client and the worker have a better experience. That truly is “An Intelligent Client Experience.”

“We are very pleased with the ability to see work in progress in real-time, that there is little to no unassigned work, and that work is evenly and fairly distributed.”

- Susan Kimbley, Placer County
