

PROMISING PRACTICES IN CUSTOMER SERVICE

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Service Environment

- A blending of sole-contract assignments and MCO operations
- Major scale programs with 100 to 30,000+ consumers
- Wide variety of models that include Support Brokers, Service Coordinators, Resource Coordinators, and other supporting elements
 - Consumer Enrollment & Training
 - Provider Underwriting & Training
 - Payroll Data Capture
 - Budget / Rule Administration
 - Funds Dispersal: paper check, direct deposit, and electronic transfer
- Customer Service resources are assigned to programs but not unique case loads

History of CDS in Texas

- Consumer Directed Services (CDS) in Texas took root in a small state program in the 1980s
- Client Managed Attendant Services (CMPAS)
 - Funded by the State outside Medicaid
 - Focused on people with disabilities who were seeking employment
 - Co-payments
- CMPAS (Client Managed Personal Attendant Services)
 - Client selected employees
 - Agency remained as employer
 - Client supervised employees via written agreement with agency



History of CDS in Texas Cont'd

- CMPAS was used as a Pilot to develop consumer direction in the late nineties
- Texas established a workgroup to develop and refine CDS
- CDS expanded to all Medicaid waivers, to traditional Medicaid programs and to Managed Care



CDS in Texas Today

- Advocates wanted to broaden the field of choice from licensed Home Health Agencies
- Early in 2000s the State removed the requirement for a home health license and established open enrollment for FMSAs
- Today – Over 100 FMSAs in Texas for consumer choice



Environmental Challenges

- Texas was a forerunner in developing partnerships with Managed Care for long term care and consumer direction
- Continued choice and competition resulted in:
 - Multiple FMSAs
 - Multiple MCOs
- Multiple State programs and MCOs have their own rules and unique billing systems



Choice in Texas Today

- The participant or his/her representative can:
 - Choose any FMSA serving their area and program
 - Change FMSAs monthly
 - Choose any MCO serving their area and service needs
 - Change MCOs monthly



Technology

- Redundant premises-based agent & client customer data management system (internally developed and maintained)
- Snail mail, fax, e-mail, telephone, smartphone, tablet and Internet interfaces to the data management system for time tracking, budget management, and information retrieval
- Cloud-based telecommunications and call center software solutions including management of:
 - voice calls (1M+ annually)
 - interactive voice response solutions (500K+ annually)
 - outbound messaging (750K+ annually)
 - e-mail response
 - social media administration
 - web chat
 - collaborative browsing

Technology

- Technology in an environment of consumer empowerment and choice
 - Ease of communications is critical to consumer satisfaction
 - Telephones
 - Website
 - Innovative Software
 - Integrated Software Modules

- Technology must:
 - Be user friendly
 - Easily linked to a live person
 - Handle multiple users with different needs and complex relationships
 - Be responsive to users with all levels of education and technology capability
 - Meet all rule requirements: state, federal, and program



Quality

- Digital voice recording of all customer interactions
- Defined pass/fail quality standards on interaction attributes
- Calibration sessions with clients to ensure continuity of experience
- Consolidated reporting to provide:
 - internal employee feedback and coaching information
 - Client reporting

Quality

- State provides a Quality Monitoring Guide
- The monitoring guide is built into the software's quality checks and management reports



Reporting

- Data warehouse
 - Seven years of call activity records
 - Five years of digital voice records
 - All data available for customized analytics and reporting (trends, arrival patterns, etc.)
- Integrated analytics tying
 - waiver data,
 - payroll data,
 - customer interaction data together
- Online, real-time access to client authorizations

Reporting

- Software has numerous reports including:
 - Timesheets pending and how long
 - Criminal history checks pending and how long
 - Guardianships approaching expiration
 - Authorizations approaching expiration
 - 18th Birthdays coming up



Service Levels

- Average speed of answer
- E-mail and message response times
- First call resolution percentage
- Outbound notifications of errors/omissions

Service Levels

- 14,454 People in Texas are in Consumer Directed Services (CDS)
- Consumers choose from over 100 FMSAs in Texas
- In-Home is one of the larger agencies in Texas serving about 1700 Employers
 - Employers live throughout Texas
 - 3,611 employers enrolled with managed care
 - 10,843 employers enrolled in FFS
- Following face-to-face intake, each Employer is Assigned an Employer Assistant (EA)



Customer Service Resources

- Call center professionals
 - Waiver participants
 - Veterans
 - People with disabilities
 - English and 12 other languages handled with internal staff
 - Over 100 additional languages & dialects supported through real-time translation services
- Computer-based training modules for each unique program
- Performance management and incentive compensation to encourage interaction quality and productivity

Consumer Service Resources

- Bi-lingual intake (Spanish/English/Vietnamese)
- Staff available for statewide face-to-face in home orientation and signing of paperwork
- Designated Employer Assistant (EA) for ongoing service relationship
- Multi-cultural staff with a wide variety of education and work backgrounds
- Consumers are allowed to switch EAs for the best fit



Self-Service

- All access tools tied to a central data repository
 - Smartphone
 - Tablet
 - Internet portal
 - 24/7 automated voice system
- Employee time tracking software systems

Self Service

- “In-Home, Where You’re the Boss” – Founding slogan in 1996 for In-Home Attendant Services (before the first Consumer Directed program in Texas)
 - We support Employer success
 - We provide information and resources in person, by phone, fax and website



State Liaison Relationships

- Variety of distributed roles and responsibilities between our role as FMS and state workers
- Dedicated phone numbers to allow state and MCO staff access to:
 - Call center support
 - Support Brokers
 - Service coordinators
- Portal access with unique security parameters to allow direct system access

State Liaison Relationships

- Software assists in maintaining up to date contact information with all the related parties for a given consumer
 - Intake staff, Employer Assistants and Billing Specialists all have periodic contact with Case Managers and must work closely together on a variety of issues



Peak Volumes

- Workforce Administration software and erlang-C calculations provide statistical insight into scheduling
- Peak-time, part-time customer service staffing resources for high volume schedule components to assist with Tier 1 inquiries
- Self-service options through Internet and telephony interfaces to reduce demand on cyclical customer service staff time

Peak Volumes – Work Flow

- Work demands ebb and flow with the payroll cycle every other week and with popular bonus months
- Periodic budget reporting – simplified with the software's real time budget data
- Tax filing deadlines – separate tax and accounting department
- Federal and state code changes – associated peak in claim denials



Vision

- Current generation is the last of the non-technical
 - Tomorrow's retirees are far more conversant with smartphone and associated technologies
 - Tech advancements continue to improve access for participants, providers, and other support resources (MCO staff, Case Managers, Support Brokers, etc.)
 - Voice to text
 - Alternate computer control interfaces
- Advent of smart technologies is changing our expectations as customers. We want information and the ability to do transactions when we want, where we want, how we want.

Vision

- Person Centered Planning is alive, well and growing nationally and in Texas
- Person Centered Services must be part of Financial Management Services in order to support Employer success in self-direction
- Participants and their families have come to expect a level of personal service from their FMS agency



Questions

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