

Utilizing a Call Center to Contact Customers on the Waitlist Florida Division of Vocational Rehabilitation

Abstract

The Florida Division of Vocational Rehabilitation (DVR) implemented an Order of Selection (OOS) in 2008 due to insufficient resources to serve all eligible customers. The agency had a long waitlist and a backlog of customers waiting to be seen by counselors for employment planning. In response to this situation, DVR used American Recovery and Reinvestment Act (ARRA) funds to establish a call center in 2009, hiring hourly, non-benefitted staff to contact customers on the waitlist. The purpose was to keep customer information current and to determine whether they were still interested in and available for VR services. As a result of the call center, DVR was able over a period of one and a half years to significantly reduce the waitlist and serve customers prioritized as having most significant and significant disabilities without wait.

Background

In 2008, DVR implemented an OOS policy. Specifically, the agency established three priority categories (most significant disabilities [MSD], significant disabilities [SD], and not significant disabilities [NSD]) and a waitlist. The number of waitlisted customers increased from 5,628 in August 2008 to 11,145 in September 2009.¹ According to our key informants, some customers waited almost a year before they received VR services.

Along with this backlog of customers, DVR was facing constraints in hiring counseling staff to handle the increased number of customers on the waitlist. To address this problem, the agency determined that one particular aspect of a counselor's job—maintaining contact with customers on the waitlist—could be done by someone other than a counselor and that this would allow counselors to concentrate on counseling and guidance, employment planning, and case management. This provided the impetus for establishing a temporary call center in 2009.

Purpose, Goal, and Implementation

The purpose of the call-center effort was twofold: a) to reduce counselor time spent on following up with waitlisted customers by shifting this responsibility to call-center staff, and allowing counselors to concentrate on counseling and guidance, employment planning, and case management and b) to update the contact information of waitlisted customers and determine their interest in and availability for VR services. The goal was to reduce the waitlist and be able to serve customers with the MSD and SD without wait. DVR's Bureau of Partnerships and Communication oversaw and managed the implementation of this effort

DVR used ARRA funds to hire staff for the call-center positions (which were temporary and paid hourly). Staff were hired for day and evening / weekend hours in order to call and receive calls from customers who were not available during business hours. DVR hired a total of six staff (three full-time and three part-time).

Prior to establishing the call center, Bureau staff presented the concept to Division leadership and field supervisors at a statewide VR supervisor meeting in July 2009. Supervisors informed counselors about the effort and implications for counselors' work.

DVR developed a manual—Florida Call Center Procedure Manual²—to guide the implementation of this effort. The manual specified the tasks of call-center staff. This included: a) contacting customers on the waitlist, b) updating customer contact information, c) determining customer interest in and availability for VR services, d) calling customers who would soon be released from the waitlist to update them on their status, and e) assisting DVR fiscal staff with the confirmation of invoices

¹ FRC New Orientation Session; DVR Director Presentation (September 20-22, 2009)

² Florida VR Call-Center Procedure Manual: Version 1.1 (May 31, 2010)

from employment-service providers for the services they had provided to VR customers. The manual also contained protocols for researching customer-contact information and making calls (including scripts), as well as templates for letters to be sent to customers.

Call-center staff called customers on the waitlist, starting with customers with MSD and according to their application date, followed by customers with SD and then NSD.

Call-center staff used an electronic tickler system to determine what follow-up needed to be done (e.g., which customers, which priority category, last contact / next contact, etc.). The tickler system was integrated with the Division's electronic case-management system. Call-center staff documented each action, entering key words that the system then used to populate routing sheets with customer names and case numbers for the next action. Sheets were generated each morning and distributed to call-center staff, who then took the next indicated action (e.g., make call #2; research; send closure letter).

Because call-center staff activities were integrated into the case-management system, counselors were notified when call-center staff contacted a customer on their caseload. Call-center staff could also access case notes to see if customers, who had been contacted by the call center for possible case closure, had been in touch with their counselor, indicating that they were still interested in and available for VR services. Initial counselor concerns about call-center staff contacting customers and accessing and adding case notes were resolved once counselors realized how helpful it was to have someone contacting waitlisted customers and updating their caseloads.

As the waitlist contact was winding down (February 2010), call-center staff assumed an additional responsibility—verifying customers' achievement of certain employment-related benchmarks for which contracted employment-service providers had submitted an invoice to DVR. The purpose was to check if these invoices had been submitted appropriately.

Results

As a result of the call center, DVR was able to significantly reduce the waitlist and to release customers with MSD and SD (but not NSD) from the waitlist. Since then, individuals with MSD and SD are being served without wait. Individuals left on the waitlist are more evenly distributed across application times, and contact responsibilities have been returned to the field staff (counselors).

At the counselor level, having call-center staff contact customers on the waitlist prior to their release was helpful because, once customers had been released, they were easy to contact and ready to engage in VR services. Counselors did not have to spend a lot of time trying to locate individuals or contact individuals who perhaps were no longer interested in or available for rehabilitation services.

At the agency level, the activities of the call center gave DVR leadership more confidence that caseloads were not artificially inflated when customers were released from the waitlist, thus providing a better estimate of how much case-service money and counselor time would be needed to handle the influx of customers. In addition, knowing that customers coming off the waitlist would be active, DVR leadership had the ability to plan for releasing the next wave of customers based on available financial and counselor resources.

For more information about this practice and to contain a copy of the call-center procedure manual or other materials, please contact: