



**Office of Children
and Family Services**

**Human Services
Call Center**

ANDREW M. CUOMO
Governor

SHEILA J. POOLE
Acting Commissioner

Operations Manual



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Human Services Call Center 1 Broadway Center, 9th Floor, Schenectady, NY 12305 (518) 388-0201 ocfs.ny.gov



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OCFS MISSION STATEMENT

“The Office of Children and Family Services serves New York’s public by promoting the well-being and safety of our children, families and communities. We will achieve results by setting and enforcing policies, building partnerships, and funding and providing quality services.”

CALL CENTER INITIATIVE

The *Consolidated Call Center Project* is a Governor’s initiative to assist those who call for information from New York State agencies. Governor Cuomo believes that every caller should receive consistent, accurate, high quality service.

Toward that goal, New York embarked on an enterprise-wide effort to consolidate information and referral calls from more than 30 agencies into four Anchor Agencies. The consolidation enhances operational efficiencies, improves business processes and delivers better customer service.

OCFS was selected as one of the four anchor agencies to create the Human Services Consolidated Call Center (HSCC), serving the following agencies:

- Office for People With Developmental Disabilities (OPWDD)
- Department of Health (DOH)
- Office of Victim Services (OVS)
- Office of Alcoholism and Substance Abuse Services (OASAS)
- Department of Civil Service (DCS)
- Office of Temporary and Disability Assistance (OTDA)
- Office of Children and Family Services (OCFS)
- Workers’ Compensation Board (WCB)
- Higher Education Services Corporation (HESC)
- Division of Veterans’ Affairs (DVA)

HOURS OF OPERATION

HSCC will operate Monday - Friday 8:30 am - 5:00 pm, except State Holidays.

CONTACT INFORMATION

Telephone: 518-388-0201

HSCC Email: ocfs.sm.callcenter@ocfs.ny.gov



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Patricia Johnston	Director's office	Patricia.M.Johnston@ocfs.ny.gov

TRANSITIONING TO THE HSCC

HSCC Responsibilities	Customer Agency Responsibilities
HSCC will analyze existing Interactive Voice Response (IVR) announcements, call routing and skill sets currently used by the line of business.	The Customer Agency will provide HSCC information related to existing phone script, IVR, announcements, after hours announcements, call routing and skill sets.
HSCC will work with appropriate Customer Agency contact for CapNet/VOIP phone and ITS assistance.	Customer Agency will assist in review and approval of final changes to IVR, call routing, updates to websites to increase use of self service.
HSCC will use a phased approach beginning with current customer phone script to gain benchmarks. If changes are needed, HSCC will work with Customer Agency to analyze and make recommendations.	Customer Agency will meet with HSCC at agreed upon intervals to assist with continual process improvement. (ex. monthly) Customer Agency will continue to meet with HSCC as needed to discuss HSCC proposed changes to IVR, phone script, announcements and call routing to improve service. Customer Agency will sign off on all changes.



CALL HANDLING PROCEDURES

<u>HSCC Responsibilities</u>	<u>Customer Agency Responsibilities</u>
HSCC will provide Customer Agencies with a contact number and/or mail box for the Call Center Operations Managers or to communicate or discuss calls as needed.	The Customer Agency will assist with HSCC Business Analysis (BA) to determine the scope of calls which will include providing survey data, training materials, meeting regularly with HSCC BA staff, allowing listening in sessions and other BA work.
HSCC will use email to respond to inquiries and suggest messaging in the IVR to promote caller self-service whenever possible.	The Customer Agency will assist with self-service by providing updated information on its website.
HSCC Agents will resolve calls using content as specified in the Program Information Document. Content is gathered during the Business Analysis process.	Customer Agency will verify and sign-off on content including: KB Content, Scripts, Frequently Asked Questions (FAQs), IVR, Call Flow, and Announcements.
HSCC will meet with Customer Agency at agreed upon intervals to discuss call metrics and process improvements.	Customer Agency will meet with HSCC at agreed upon intervals to assist with continual process improvement (ex: monthly).
HSCC will meet with Customer Agency as needed to review and minimize erroneously transferred calls.	Customer Agency will review any erroneously transferred calls with HSCC staff as needed.
	Customer Agency will provide a list of common referral agencies to the HSCC.



AFTER CALL WORK (ACW) AND NON-CALL WORK

HSCC Responsibilities	Customer Agency Responsibilities
HSCC will mail forms as requested by callers who cannot receive them electronically.	Customer Agency will provide special publications to the HSCC for distribution outside of general forms.
HSCC will make every effort to send out forms by next business day.	Customer Agency will review metrics and costs of mailing or other ACW or post call work with the HSCC as needed.
HSCC will fax information requested to callers who cannot receive it via email. The HSCC will make every effort to do this within the same business day.	
HSCC will provide information to the Customer Agency on the number and types of forms being sent monthly.	



LEVEL 2 (L2) CALL HANDLING PROCEDURES

HSCC Responsibilities	Customer Agency Responsibilities
If the call is Level 2, the HSCC Agent will email a ticket to the Line of Business.	Customer Agency will work with HSCC BAs to determine the list of L2 transfers, KB transfer procedures, e-mail addresses and phone numbers required for L2 transfers.
Immediate mandatory L2 phone transfers will be evaluated during the Business Analysis phase. If agreed to perform immediate L2 phone transfers, the information will be listed in the Knowledge Base	Customer Agency will review any erroneously transferred calls with HSCC staff as needed.
HSCC Agents will transfer to hold queues or to voice mail. For efficiency and to meet Service Level Agreement (SLA) metrics, the HSCC Agents cannot wait for warm transfers.	
HSCC Agents will use a consistent explanation for the need to transfer and explain to the caller what he/she may expect (hold or voicemail and approximate time to receive a return phone call). See examples below*	Customer Agency will make every effort to monitor Voice Mailboxes for the phone transfer numbers given to HSCC. If L2 staff are out of the office (sick time, personal time, vacation, etc.) the Customer Agency will arrange to forward desk phones and/or transfer numbers to an available person. Customer Agency will provide HSCC with an expected return call time and make every effort to meet that expectation.
If the HSCC Agent needs assistance, he/she will seek guidance from an HSCC supervisor.	
HSCC BA staff will review Level 2 transfers with Customer Agency at determined intervals for continual process improvement.	



ESCALATION

<p>The HSCC Agent will escalate a call to an HSCC supervisor when</p> <ul style="list-style-type: none"> • The caller asks to speak to the supervisor or someone in authority. • The caller’s request is inappropriate for the call agent to resolve (for example they are complaining about a staff member. • The customer has a question about a product or policy and the HSCC Agent cannot resolve the problem. • The caller’s request is too complex for the call agent to resolve but it is not an L2. • The caller becomes irate. 	
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RED PHONE PROCEDURE

The HSCC will immediately alert the Customer Agency in the event a caller expresses extraordinary frustration. Some examples may include, but are not limited to:

- Calling or going to the Governor’s Office
- Calling or going to the Commissioner
- Calling or going to the news media (Television, Newspaper, Social Media)
- Threatening to sue, launch a lawsuit or pursue some legal action
- Stating they will go to the offices of the Customer Agency (when the agency does not normally entertain visitors from the public)
- Other extenuating circumstances, such as, a caller describing an extreme, exceptional or dire circumstance and requires immediate assistance.

In such circumstances, the HSCC will send the “Red Phone” template (see Appendix C) to the pre-defined distribution list at the Customer Agency. The HSCC will follow up with phone calls to the pre-defined numbers at the Customer Agency. The “Red Phone” template will provide as much specific detail as is available, including any available caller contact information. The template will also identify whether the matter is urgent or is of extenuating circumstances where follow up is needed, ideally within 1–2 business days.

The Customer Agency will be responsible for developing internal procedures for the processing and notification of receipt of a “Red Phone” template from the HSCC.



HUMAN SERVICES CONTACT CENTER THREAT CALL PROCEDURE

When a Call Center Representative (CCR) hears a caller threaten harm to himself/herself or to others the CCR will set the value of the "Threat Call" drop down menu in Oracle RightNow to "Yes":

This will launch the Threat Guide in RightNow. The CCR will initiate call recording, if needed, and then send an instant message via Lync to the "ocfs.dl.hssc.threat" DL stating: "THREAT CALL."

At that time a supervisor will approach the CCR's desk and take over the call at the CCR's desk. The supervisor will complete the Threat Call Template and save it in the format "HSCC_Threat_Guide_Date."

A second supervisor will contact 911 as appropriate to notify law enforcement of the situation.

At the completion of the call, the supervisor will code the incident and save it in RightNow. RightNow will then send an email notification to the "ocfs.dl.hssc.threat" DL. HSCC Operations Management will create an email notification and attach the completed Threat Call Template.

The standard language for the email is:

The attached document contains information pertaining to a threat. Our Procedure requires that we bring this matter to your attention.

Please advise if we can be of additional assistance.

The email will be sent to the appropriate contacts listed in the Red Phone contacts for that Agency /LOB with a cc to Project Director and Project Coordinator.

See Appendix D "Human Services Contact Center Threat Call Procedure"



CUSTOMER AGENCY STAFF SHORTAGES – L2 HANDLING PROCEDURES

The HSCC can provide alternate L2 Call Handling procedures when the Customer Agency is experiencing low staffing volumes due to a temporary staffing shortage, a large staff meeting, training sessions, off-site events such as holiday gatherings or picnics, weather events, widespread traffic issues, or other incidents that result in low staffing levels.

Alternate Call Handling Procedure will be put in place as soon as the HSCC is notified of a staff shortage. The options for Alternate Call Handling Procedures are:

- The HSCC will take names and numbers instead of transferring L2 calls
- The HSCC will transfer to an alternate phone number.

The HSCC will notify callers that they are being transferred to a voicemail and after leaving a message, someone will return their call within one business day.

STANDARD LANGUAGE

Transfers

HSCC Agents will use the following language:

1. **Explain** to the caller why they will be transferred:
"Mrs. Kent. Your inquiry requires assistance from a Subject Matter Expert who will be better able to assist you."
2. **Ask permission** to transfer the caller:
"Would you please hold while I transfer you to someone in that area who would be able to assist?"
3. **Transfer** the call to the Subject Matter Expert.

Hold Procedures

HSCC Agents will ask the caller if he/she may place them on hold. If possible, the HSCC Agent will provide an approximate hold time to the caller.

1. **Explain** to the caller the reason for the hold and set an expectation for length:
"Mr. Smith, I need to put you on hold for 1-2 minutes while I check for an answer to your question."
2. **Ask** for permission: *"May I please put you on hold?"*

After returning to the call, the HSCC Agent will thank the caller for holding.

LANGUAGE SERVICES

HSCC will have one or more Spanish speaking Agents.

HSCC will record announcements and IVR selections in English and Spanish.

HSCC will contract with a language translation service to provide assistance to non-English, non-Spanish speaking callers.



NON-SPECIFIC LINE OF BUSINESS TRANSFERS (OTHER REFERRALS):

Abuse or Neglect of a Child

If a caller wishes to report the abuse or neglect of a person, we will transfer him/her to the State Central Registry for Child Abuse and Maltreatment (SCR) or the NYS Justice Center, based on the age of the person the call is in reference to. The agent will do a “warm transfer” using the conference feature to be sure that the caller and the other agency are connected.

If the caller states that he/she is a mandated reporter, he/she will be directed to call the SCR Mandated Reporter line at 1-800-635-1522.

If the person is under 18 years of age, the calls will be directed to the SCR at 1-800-342-3720. For ages 18 and over, the calls will be directed to the Justice Center at 1-855-373-2122.

Calls for Out-of-State Services

HSCC Agents will use the following language:

“Thank you for calling the NYS Human Services Call Center. We are unable to assist callers regarding services available in other states. Check your state’s website for contact information. Or, contact your local Directory Assistance by telephone.”

Calls for Supported Lines of Business

If a call comes in on one line, and it turns out to be a call for another line of business for which we take calls – or - if the caller asks a subsequent question that belongs to another line of business for which we take calls, the HSCC Agent will handle the call if they are skilled for that line.

If the HSCC Agent is not skilled for that line, he/she will transfer the call to the appropriate queue in the HSCC and inform the caller that he/she will be transferred.

Calls for Un-Supported Lines of Business

Calls that are for one of our customer agencies but is not a line of business which we support, or if the caller asks a subsequent question that belongs to a line of business we do not support, the caller will be directed to that agency’s website. The caller can also be directed to www.ny.gov for numbers and websites for all State agencies.



EMERGENCY CALLS

If a caller is calling about an emergency regarding someone/something other than themselves, the HSCC Agent will direct the caller to disconnect and dial 911.

If there is an actual emergency situation with the caller on the phone, the HSCC agent will not disconnect and will assist by doing an appropriate warm transfer to 911, or other crisis line. (Ex: suicidal caller transferred to crisis line.)

EVACUATION / DOWN TIME PROCEDURES

If the HSCC must evacuate, the HSCC will activate an emergency message as soon as practicable. The message will state that we are temporarily unavailable to take the call and will instruct the caller to call back at a later time or leave a voicemail message if he/she prefers. HSCC staff will retrieve messages and begin call-backs when normal operations resume.

The HSCC will make every effort to communicate downtime to the Customer Agency as soon as is feasible.

During NON-emergency downtime, the HSCC will make its best effort to communicate the situation to the Customer Agency. Examples of non-emergency downtime include but are not limited to:

- Power outage
- Urgent system maintenance
- Loss of communication between HSCC and the call center infrastructure
- Fire drills or other emergency preparedness training

Per the SLA, the HSCC will strive for minimal downtime.

In the event of an emergency or other downtime where the HSCC cannot implement a message, the Customer Agency will be instructed to contact their carrier to add a message or to divert calls to their local number.

Routine maintenance will be conducted before 8:30 a.m. or after 5:00 p.m.



CHANGE MANAGEMENT PROCEDURES

<u>HSCC Responsibilities</u>	<u>Customer Agency Responsibilities</u>
<p>HSCC will provide a change management form for use in change requests by line of business.</p> <p>See Appendix A – “HSCC Change Management Request Form.”</p>	<p>Customer Agency will use the HSCC-provided Change Management Request Form to request changes in HSCC line of business.</p>
<p>HSCC will review all change management requests and provide an initial response to the Customer Agency within 48 hours. HSCC will provide a tracking number to Customer Agency when change request is received and logged.</p>	<p>The Customer Agency will submit change request as early in advance of the need as feasible.</p>
<p>HSCC will develop an implementation plan for the requested change or provide information on what may need to be addressed in order for the change to occur.</p>	<p>The Customer Agency will assist the HSCC staff to change IVR and other communications about any change in hours of operation or other changes impacting Call Center operations.</p>
<p>Changes to announcements, skills, routing, menu option choices require 2 weeks from the submission of the finalized request.</p>	
<p>New lines of business require 8 weeks from the submission of the finalized request. Note: this does not include up-front Business Analysis work cycles.</p>	

Should it become apparent that an incident would require an extended resolution process exceeding normal best efforts, there will be an assessment performed to determine if escalation is warranted. The assessment will include consultation with the customer and a new issue resolution time will be provided.

See Appendix A – “HSCC Change Management Request Form”



METRICS / REPORTING

HSCC Responsibilities	Customer Agency Responsibilities
<p>HSCC will provide regular reports to the Customer Agency per line of business.</p> <p>Standard during initial implementation period: Weekly</p> <p>Standard after initial implementation period: Monthly</p>	<p>Customer Agency will assist HSCC in determining which reports are relevant for their line of business.</p>
<p>HSCC will make its best effort to provide reports as agreed upon and determined necessary between the HSCC and Customer Agency outside the standard timeline - HSCC will provide weekly reports for the first four weeks after implementation. The reports will continue on a monthly basis after the initial four weeks.</p>	<p>The Customer Agency will provide a written request to HSCC for reports needed outside of the monthly standard.</p>
<p>HSCC will assist Customer Agency to achieve cost savings by reducing the cost related to keeping toll-free lines. After implementation, HSCC will provide metrics on calls received by toll-free numbers compared to calls received on local numbers.</p>	<p>Customer agency may achieve cost savings by reducing toll-free numbers that are not mandated.</p> <p>Customer agency may review published toll-free numbers on distributions and websites, and develop a plan to migrate to a local number.</p>
<p>HSCC will implement performance improvement measures necessary to meet standard service level agreement for Information and Referral call handling. Improvement measures include, but are not limited to changes to:</p> <ul style="list-style-type: none"> • IVR announcements • Call routing • Increased use of self-service tools 	<p>Customer Agency will assist in review and approval of final changes to IVR, call routing, updates to websites to increase use of self service.</p>



QUALITY ASSURANCE (QA)

HSCC Responsibilities	Customer Agency Responsibilities
HSCC will make every effort to follow the metrics and recommendations set forth in the QA Manual to perform at or above the recommended number of Call Monitoring sessions per Agent per month.	Customer Agency will meet with HSCC staff at determined intervals to discuss aggregate QA information and establish performance improvement needs where determined necessary.

See QA Manual



KNOWLEDGE BASE (KB)

HSCC Responsibilities	Customer Agency Responsibilities
<p>HSCC will create searchable information for the line of business that has been vetted and approved by the Customer Agency.</p>	<p>Customer Agency will provide copies of relevant resources to be used by HSCC Agents to answer line of business level one questions or referrals as determined (ex: regional map or phone list). This will be an ongoing need as information changes.</p>
<p>HSCC will develop KB information from Customer Agency approved line of business scripts.</p> <p>The KB will be used as a training tool for new HSCC Agents, creating continuity in knowledge acquisition and transfer.</p>	<p>Customer Agency can use KB content as a training resource for their staff.</p>
<p>All HSCC Agents will use the KB to provide the same answer to the line of business questions based on information provided in the KB.</p>	<p>The Customer Agency will use the Change Request process to request a change in the KB.</p> <p>If there is a need for an immediate update to the KB, the Customer Agency can communicate to the HSCC through HSCC mailbox or Call Center Manager Contact and then follow up with a change request.</p>
<p>Knowledge Base information will be maintained by the HSCC based on change requests submitted by the Customer Agency.</p>	<p>Customer Agency will approve content.</p>
<p>The HSCC will only collect caller demographics when requested by the Customer Agency. The HSCC will not add specific caller demographics to the Knowledge Base content, therefore, the HSCC will not support screening callers by name.</p>	



TRAINING AND IMPLEMENTATION SUPPORT

HSCC Responsibilities	Customer Agency Responsibilities
The HSCC will develop a training program based on the Training Guide and other curriculum developed and submitted by the Anchor Agencies in conjunction with the OCFS Bureau of Training.	The Customer Agency will provide training materials / procedure manuals and other relevant training materials to the HSCC for development. (Ongoing if new material is created by the Customer Agency.)
The HSCC Agents will be trained and have line of business specific training prior to implementation.	The Customer Agency will provide subject matter expert(s) to assist with content based training exercise creation. (Ongoing if new content is added at the request of the Customer Agency.)
	The Customer Agency will provide subject matter expert(s) to assist with training session(s) at the HSCC site during the Line of Business Implementation or should the agency require a significant change/ addition in subject content.

--See Training Guide

STAFFING

HSCC may use temporary staff as needed to address call volume or Customer Agency needs. The temporary staff will be provided with sufficient training in order to prepare them to take calls via a streamlined process. The temporary staff will be required to answer all questions from the content of the KB just as other HSCC Agents.

MOBILE TECHNOLOGY

In the future HSCC will use mobile technology as necessary to create efficiencies. The use of telecommuting / alternate work sites and mobile agents will be considered and used to assist with scaling and continuity of operations as needed.

Telecommuting guidelines and other policy documents will be provided to Customer Agencies as requested.



CALL RECORDING AND SCREEN RECORDING

The HSCC has reached agreement with all but one customer agency to records their calls for quality assurance purposes. As stated in the SLA, the retention period for recorded information will be no longer than 30 days unless HSCC and the Customer Agency agree in writing that HSCC will maintain these recordings for a shorter or longer period of time. Calls are randomly selected for review and the performance of the Call Center Representative fielding the call is graded using a formal score card.

The HSCC will provide aggregate information back to the Customer Agency on a regular basis (standard - monthly) about QA findings.

The HSCC currently does not have screen recording capabilities but will in the near future.

CUSTOMER AGENCY REQUESTS FOR RECORDED CALL PLAYBACK

Any authorized customer agency staff may contact the Human Services Call Center (HSCC) either by phone (518) 388-0201 or by emailing the Call Center mailbox at ocfs.sm.callcenter@ocfs.ny.gov and request to listen to one or more of their calls.

HSCC Process:

The HSCC will send a response confirming the receipt of the request and notifying the requester that our policy is to have the call available to be listened to within 2 business days.

The request will be forwarded to the Quality Assurance (QA) team.

1. The QA team will search the recorded call database and pull the recording(s).
2. The QA team will redact any personal data or confidential data.
3. The QA team will contact the requestor to schedule a date and time to listen to the recording(s).
4. The requestor will be conferenced in, so they can listen to the call with the QA staff and preferably their Business Systems Analyst representative.

HSCC purges all recordings after 30 days so requests to listen must be made within this time frame.



APPENDIX A – HSCC CHANGE MANAGEMENT REQUEST FORM

CUSTOMER REQUEST FOR CHANGE MANAGEMENT														
Instructions:		Customer Agency - Please complete the columns <u>not</u> shaded or marked HSCC and sign at the bottom. HSCC - Please complete the shaded columns, marked HSCC.												
Req # (HSCC)	Date of Request	Type of Request (See Drop Down List)	Description of Change Needed	Status (HSCC)	Date Completed (HSCC)	Requestor Name	Agency	Line of Business	When Needed	Suggested Solution	Areas Impacted by Proposed Change (HSCC)	Description of Impact (HSCC)	Time Estimate (HSCC)	BA Lead (HSCC)

Agency Contact Information: Please provide more than one person			Comments (HSCC) Can include information about the reason for estimated time for completion or questions back to the Customer in order to implement the change
Name	Email	Phone	

Customer Agency Sign-Off



APPENDIX B – CHANGE MANAGEMENT EXAMPLES

Change Incident	HSCC Responsibilities	Customer Agency Responsibilities
<p>Urgent need to make a minor change to an existing line.</p> <p>For example, addition of a new announcement</p>	<ul style="list-style-type: none"> • Communicate the issue to HSCC Agents and all Staff as needed. • Update the Knowledge Base as needed. • Update IVR message to provide new information. 	<ul style="list-style-type: none"> • Complete the HSCC Change Management Request Form and submit to the HSCC mailbox. Provide HSCC an overview of the change and detailed instructions including the text and IVR flow update. • Update agency website to assist with communication as needed.
<p>Urgent need for a new 800# to handle an event that will occur in next 24-72 hours.</p>	<ul style="list-style-type: none"> • Analyze impacts to all project deliverables and to all metrics. • Analyze resource impacts. • Communicate the issue to HSCC Agents and all Staff. • Update script to reflect new event. • Update Knowledge Base with new responses. • Update IVR message to provide new information. • Obtain resources for additional calls. • Update Intake Log as needed. 	<ul style="list-style-type: none"> • Participate in post-implementation conference calls and metric reviews • Complete the HSCC Change Management Request Form and submit to the HSCC mailbox.



Change Incident	HSCC Responsibilities	Customer Agency Responsibilities
<p>Urgent need for a small to medium change to an existing line.</p> <p>For example, addition of announcements and addition or change in Call Distribution options</p>	<ul style="list-style-type: none"> • Communicate the issue to HSCC Agents and all Staff as needed. • Update Knowledge Base as needed. • Update IVR message to provide new information. 	<ul style="list-style-type: none"> • Complete the HSCC Change Management Request Form and submit to the HSCC mailbox. • Provide HSCC an overview of the change and detailed instructions including the text and IVR flow update. • Update agency website to assist with communication as needed.
<p>Urgent need for a new 800# to handle an event that will occur in next 2-6 weeks</p>	<ul style="list-style-type: none"> • Analyze impacts to all project deliverables and to all metrics • Analyze resource impacts • Begin an accelerated Business Analysis timeline 	<ul style="list-style-type: none"> • Complete the HSCC Change Management Request Form and submit to the HSCC mailbox. Identify resources: SME's, Stakeholders, IT Resources, PIO. • Participate in all activities related to an accelerated Business Analysis schedule.
<p>Any requests for new or changes to existing lines to handle an event that will occur in next 2+ months:</p>	<ul style="list-style-type: none"> • Analyze impacts to all project deliverables and to all metrics • Analyze resource impact • Discuss results of the change request analysis with customer agency • Begin Business Analysis timeline 	<ul style="list-style-type: none"> • Complete the HSCC Change Management Request Form and submit to the HSCC mailbox. • Identify resources: SME's, Stakeholders, IT Resources, PIO • Participate in all activities related to the Business Analysis schedule.



APPENDIX C – RED PHONE TEMPLATE

- RED PHONE
- URGENT - Resolve Today
- NEEDS ATTENTION - Follow Up 1-2 Business Days

Line of Business: _____

Date: ____ / ____ / ____

Time of Call: ____ : ____ AM/PM

Caller Name: _____

Caller Phone #: (____) _____ - _____ (Collect ANI if possible)

Caller's Issue / Complaint is: _____

Caller's Specific Words: _____

Action Taken by HSCC: _____

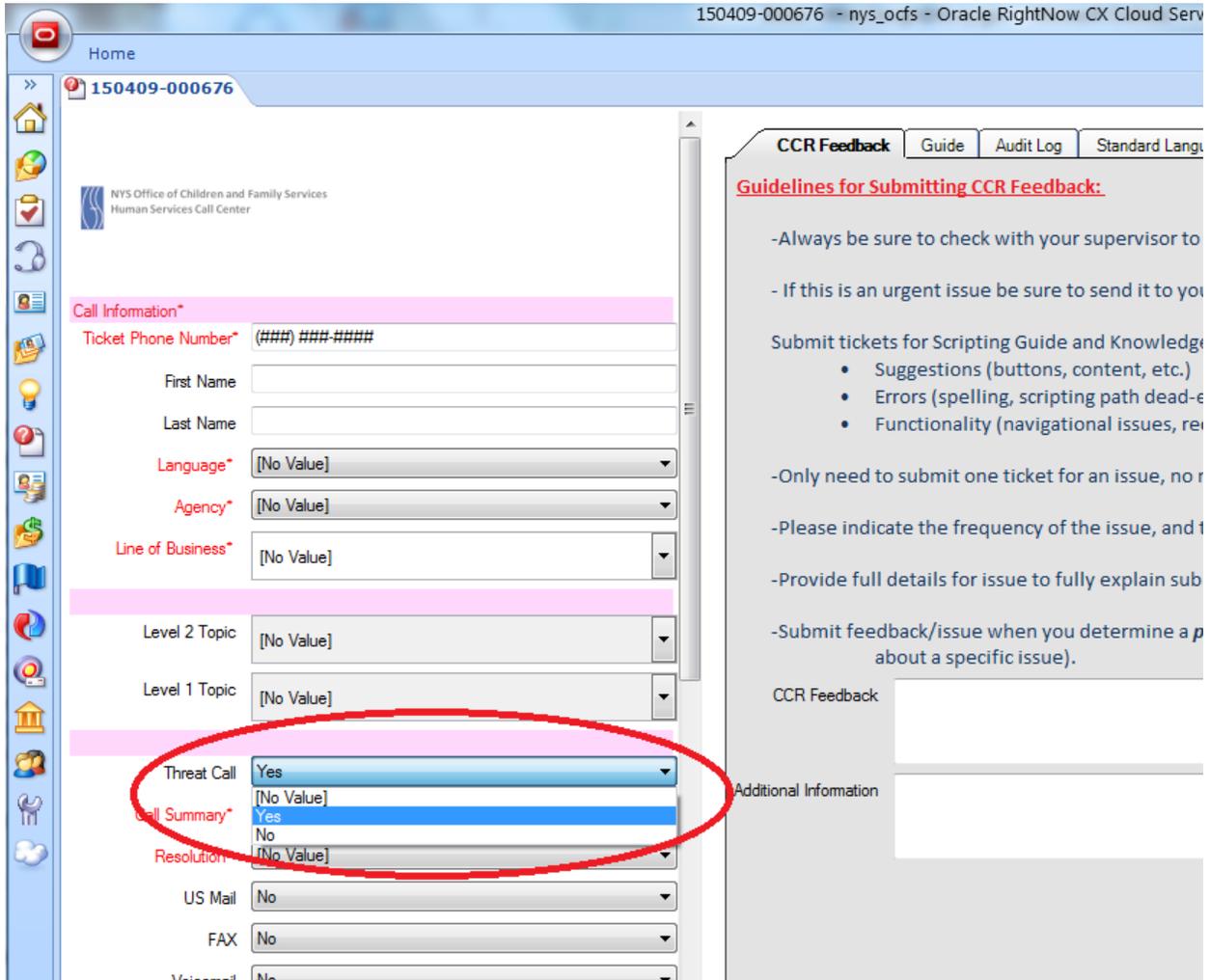
HSCC Manager

CC: Agency / Line of Business
Kathryn Shelton, Assistant Commissioner
Mike Clough, Assistant Director
Lead Business Analyst



APPENDIX D - HUMAN SERVICES CONTACT CENTER THREAT CALL PROCEDURE

When a Call Center Representative (CCR) hears a caller threaten harm to himself/herself or to others the CCR will set the value of the "Threat Call" drop down menu in Oracle RightNow to "Yes":



This will launch the Threat Guide in RightNow. The CCR will initiate call recording, if needed, and then send an instant message via Lync to the "ocfs.dl.hsc.threat" DL stating: "THREAT CALL".



At that time a supervisor will approach the CCR's desk and take over the call at the CCR's desk. The supervisor will complete the Threat Call Template and save it in the format "HSCC_Threat_Guide_Date".

A second supervisor will contact 911 as appropriate to notify law enforcement of the situation.

At the completion of the call the supervisor will code the incident and save it in RightNow. RightNow will then send an email notification to the "ocfs.dl.hsc.threat" DL. HSCC Operations Management will create an email notification and attach the completed Threat Call Template.

The standard subject line for the email is: "Threatening Call received on %Agency Name% - %LOB%"

The standard language for the email is:

The attached document contains information pertaining to a threat. Our procedure requires that we bring this matter to your attention.

Please advise if we can be of additional assistance.

The email will be sent to the appropriate contacts listed in the Red Phone contacts for that Agency/LOB with CC to Kathryn Shelton and Mike Clough.



Human Services Call Center Telephone Threat Guide

Use this form if caller makes a statement of threat to staff, themselves or others including a bomb or explosive device. It shows what to do and will provide information to the police about the call.

Determine Threat:

Threat to Harm

Bomb Threat

Make sure 911 OR New York State Police at 518-457-6811 is called for instructions and HSCC management is aware and responds. Follow further instructions from police about handling call.

Stay calm. Speak calmly. Use the caller's name.

Please fill out any information you are able to gather from the caller.

Table with 2 columns and 5 rows for general call information: Supervisor Name, Callers Name, Callers Phone Number, Where is the caller presently?, Callers Address or Location.

Table with 2 columns and 3 rows for threat call information: Who do they plan to hurt/kill?, What is the plan?, Have they already done something?



Notes:	
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Fill this section out for Bomb Threats	
Where is the bomb?	
When is the bomb going to explode?	
Notes:	

Fill this section out after the call is complete	
Verizon Contact ID	
Oracle Incident #	
Line of Business	
Initial Reason for call	
Time of Call	
CCR who answered call	