EXECUTIVE SUMMARY

CSAC CHALLENGE AWARD 2019
SANTA BARBARA COUNTY DEPARTMENT OF SOCIAL SERVICES

OVERVIEW

OCTOPUS is a secure, mobile-friendly online portal for clients to send documents and messages to the Santa Barbara County Department of Social Services (DSS) - 24 hours a day, seven days a week. "OCTOPUS" is an acronym (Outbound Communication Tool Online Providing Uploaded Submissions)—but more importantly the name, together with the winsome logo design we developed, helps us memorably market the service.

CHALLENGE

We administer public assistance programs including MediCal, CalFresh, CalWORKs, and General Relief that require clients to submit a large volume of verification documents—identification cards, birth certificates, proof of income and expenses, and so on—and program rules can be complex. It can be challenging for our clients to find time to drop off documents in person, or to wait on hold for a call center representative to answer their questions.

DSS clients and applicants often asked for a way to electronically submit verification documents or inquire about their case, however, for security and policy reasons, offering two-way email communication was not an option. So in accordance with our "No Wrong Door" policy, we developed OCTOPUS.

SOLUTION

Clients can reach the OCTOPUS page directly at DSSoctopus.com, or via numerous links throughout our department's public website (countyofsb.org/social_services). There is also a Spanish version of OCTOPUS called PULPO, with translations hard-coded for accuracy. The user can toggle between the English and Spanish versions using an English/español button, or go directly to the Spanish site at DSSpulpo.com.

OCTOPUS is easy to use. The user simply completes a few fields to identify him or herself, and types their message. They can attach one or more documents by browsing to the documents if using a computer, or by snapping photos of the documents if using a smartphone or tablet. They can choose which office to send it to, or let it default to our Benefit Service Center (BSC). When the user clicks Submit, it is sent to the Microsoft Outlook clerical inbox for the desired office (either the BSC, or the district office in Santa Maria, Santa Barbara, or Lompoc). Clerical staff check these inboxes throughout the day to retrieve submissions, import/scan them for processing and follow-up, and email the appropriate worker or (at the BSC) assign a task.

INNOVATION

To our knowledge, there is only one other county social services agency in the state with a mobile-friendly, login-free, program-agnostic document and message portal. Unlike third-party attempts to offer online document submission, OCTOPUS does not require users to establish an account, remember a login and password, or download an app, and

it's not limited to one eligibility program. Thus we can offer one-click access to the service throughout our website (on the home page, navigation menu, and contact page), and clients can try it hassle-free.

Developing OCTOPUS in-house made it both cost-effective—under $5000 to build and deploy—and easy to customize. We continually seek feedback from clients, staff, and community partners, and make improvements accordingly. For example, we are currently adding automatic date/time stamping, document preview, and automatic file format conversion. And we can expand OCTOPUS to additional programs in the future.

Outreach efforts have included training for staff and community partners, posters for employee and client areas, flyers, and an on-hold message. Upcoming marketing efforts include stickers for DSS outside mailboxes, and smartphone-shaped Post-It notes that can be stuck to packets given to clients.

RESULTS

By making it faster and easier to submit documents and messages, OCTOPUS helps us improve access, improve service, reduce delays, and increase efficiency. For example, it can help fight churn: the accidental loss and time-consuming re-establishment of benefits due to issues such as late-arriving documents. And it can boost productivity: a worker with a client on the phone can have them submit their documents instantly with OCTOPUS, and wrap up their work on the case right away instead of waiting for the clients documents to arrive in the mail.

OCTOPUS is popular with clients, staff, and our community outreach/enrollment partners. Since July 2018, we have received thousands of submissions via OCTOPUS, and staff and community partners have been referring clients to the service. The state invited us to present OCTOPUS at the Big 6 meeting of county social services agencies last year, and highlights it as a model tool/best practice to help counties manage additional workload from CalFresh SSI expansion.

REPLICABILITY

OCTOPUS and its business processes were developed using readily available tools, by a small team including one County IT analyst and two DSS analysts, in consultation with DSS managers, eligibility supervisors, and IT staff. It complies with HIPAA and the SSA Privacy and Security Agreements as verified in pre-production consultation with the Department of Health Care Services.

PROJECT CONTACTS

Project contacts within our department include:
- Maria Gardner (805-346-8289, m.gardner@sbcsocialserv.org): deputy director for eligibility programs
- Dennis Tivey (805-681-4543, d.tivey@sbcsocialserv.org): development IT liaison, training/support
- Jose Clemente(805-287-3811, j.clemente@sbcsocialserv.org): mgmt. approvals liaison, policy support

OPTIONAL SUBMISSION

Please see the enclosed USB drive for a PowerPoint presentation showing the logo and examples of these materials.