

Created for Big 6 Operations Roundtable - October 16, 2018
Updated for CSCA Challenge Awards – May 10, 2019

IMPROVING THE CUSTOMER EXPERIENCE WITH **OCTOPUS**





OCTOPUS

What is OCTOPUS?

- A form on our website that lets clients:
 - Submit verifications for any eligibility program.
 - Inquire about their case or application.
- Can be used securely from any computer or mobile device.
- The client does **NOT** need to set up an account or download an app.

DSS / Contact Form

Email Us



You can use this form to securely send an email message to the Santa Barbara County Department of Social Services. If desired, you can attach a document (such as a pay stub, rent receipt, utility bill etc.) from your computer's hard drive or your phone's camera.

If you experience any problems with this form, please contact the [County Webmaster](#).

Español

English

Please let us know what we'll be helping you with:

Which Program?

- MediCal
- CalFresh
- CalWORKs / Welfare to Work / CalLearn
- General Relief
- Other

Subject:

- This is about a New Application
- This is about an Existing Case

Case Number, if you know it: (optional)

Case number

Where can I find this?

Where is OCTOPUS?

- Access by links on the DSS [website](#) (home page, menu, contact page)
- Access directly at DSSoctopus.com

Department of Social Services

- HOME
- ABOUT US
- CONTACT US
- ▶ HOW DO I...
- ▶ PROGRAMS/SERVICES
- ▶ COMMUNITY NETWORKS
- DSS NEWS
- DATA/REPORTS
- RESOURCES/LINKS
- RFPs

Contact Us

To inquire about benefits:
To *apply for benefits*, visit [www.dss.sbcounty.gov](#). If you are not available for General Reliance, visit [www.dss.sbcounty.gov](#).

To submit verification documents:
To *submit verification documents*, email in your documents to benefits@dss.sbcounty.gov.

To check your benefits status:
To *check your benefits status*, visit [www.dss.sbcounty.gov](#) or call the information line at **1 (866) 4**

To report abuse:
To *report child abuse or neglect*, visit [www.dss.sbcounty.gov](#).

HOME

cosb.countyofsb.org/social_services/

COUNTY OF SANTA BARBARA

Department of Social Services

Welcome!

We're here to help.

The Santa Barbara County Department of Social Services provides supportive services to help individuals and families in our community become supported and self-sufficient.

What can we help you with?

- [Finding affordable health coverage](#)
- [Making ends meet](#)
- [Getting enough to eat](#)
- [Getting or preparing for a job](#)
- [Protecting children and preserving families](#)
- [Keeping elder or dependent adults safe](#)

What would you like to do?

- [Apply for benefits online](#)
- [Submit verification documents online](#)
- [Check my current benefits status](#)
- [Report child or elder abuse](#)
- [Report welfare fraud](#)

Did you know?

- Get more fruits and vegetables: The Market Match program provides CalFresh benefits at participating Farmers' Markets. See [this link](#) to visit fmfinder.org to find a participating market near you.

How does it work?

- Client enters identifying info and message, attaches docs if desired, and chooses which office to send to.
- Octopus routes message & attachments to that office's clerical (AOP) email inbox.
- Clerical check inboxes several times daily, and apply same rules as for items submitted by mail or in person.
- [Demonstration](#)

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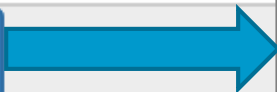
Subject:

- This is about a New Application
- This is about an Existing Case

Case Number, if you know it: (optional)

Case number

Where can I find this?



STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY
REQUEST FOR VERIFICATION

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

CASE NAME: _____

CASE NUMBER: _____

WORKER NAME: _____

WORKER PHONE/FAX: _____

DATE: _____

You have asked for CalWORKs (CW) CalFresh (CF) Medi-Cal (MC)

If you got a **CalFresh Initial Appointment Letter** or **Request for Verification** notice in the mail, you will find this on the upper-right corner.

Golden State **ADVANTAGE**

0000 0000 0000 0000
John Smith
XX **XXXXXXX**

If you have an **EBT card**, your case number is located at the bottom (skip the first two digits).

Please tell us who you are and how to reach you:

First Name:

Alexander

Last Name:

Sample

Date of Birth:

31 August, 1977

People may share the same name. Specifying your birthday may help prevent mistaken identity.

Phone Number:

(805) 681-4543

We will call you if we have a question about your message or a problem opening your document.

Please type your message below:

Message:

Please find my driver's license attached.

Would you like to send us any documents?

- Yes
 No

Please attach documents:

Please only send images (photos) or PDF documents.

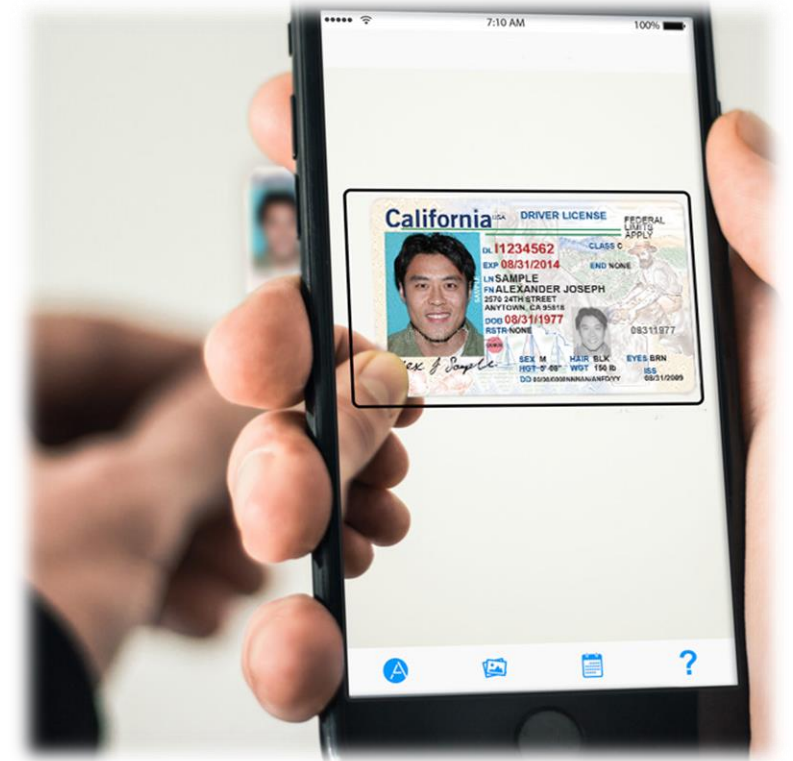
Browse... driver_license.jpg

If you need to send us a photo or other document, you can attach it or take a picture of it with your phone here. Please only upload image files (jpeg, png, gif, bmp) or PDF documents.

Need to upload more than one file or photo?

Hold down the ctrl key (cmd key on a Mac) and click the files you wish to send. All files must be in the same folder. On a phone, follow your system's instructions on how to select multiple files. On a phone, take your photos first, then click the blue Browse button above and select all the photos desired from your photo library.

The maximum file upload size is 30 MB.





Please let us know where to send this message:

Send this message to:

- Benefit Service Center
- Santa Barbara main office
- Lompoc main office
- Santa Maria main office (Betteravia / Centerpointe)
- Santa Maria Self-Sufficiency office (Broadway)

Ready to Send!

Final Verification:

 I'm not a robot 
reCAPTCHA
Privacy - Terms



Submit



COUNTY OF SANTA BARBARA

Accountability, Customer-Focus, Efficiency



DSS / Contact Form

Thank You

Your message has been received. We will receive and act on your message within three business days. You can now return to the [website](#) or [send another message](#). If you have any questions or want to follow up, you can contact your worker, or see the [contact page](#) for other ways to get in touch with us.

OCTOPUS (Outbound Communication Tool Online Providing Uploaded Submissions) v.1.6

[County Home](#)

[Contact Us](#)

[Terms of Service](#)

[Accessibility](#)

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File Home Send / Receive Folder View Tell me what you want to do...

New Email New Items Ignore Clean Up Delete Reply Reply All Forward More Meeting Monthly Reports To Manager Team Email Done Reply & Delete Create New Move Rules Unread/Read Categorize Follow Up Search People Address Book Filter Email Store

- 4 Favorites
- Inbox 2058
- Unread Mail
- Sent Items
- Deleted Items 5552

- 4 DSS Shared LO Inbox
- Inbox 1129
- Drafts
- Sent Items
- Deleted Items
- Junk Email
- Outbox
- Search Folders

- 4 DSS Shared SB Inbox
- Inbox 7533**
- Drafts
- Sent Items
- Deleted Items
- Junk Email
- Outbox
- Search Folders

- 4 DSS Shared WRC Inbox
- Inbox 300
- Drafts
- Sent Items
- Deleted Items
- Junk Email
- Outbox
- Search Folders

Search Current Mailbox (Current Mailbox)

All Unread By Date Newest

Today

SBC RES Webmaster
Octopus web form- Sample 11:16 AM

Report from Octopus web

Octopus web form - Alexander Sample

 **DSS RES Webmaster**
Tue 10/16/2018 9:46 AM
Santa Barbara Main Office

Mark as unread

← REPLY ← REPLY ALL → FORWARD ⋮

To: Tivey, Dennis;

Date: Tuesday, October 16, 2018

First Name: Alexander
Last Name: Sample
Birthdate: 31 August, 1977
Phone: (805) 681-4543

Type: New Application
Program: Medi-Cal

Message: Please find my driver's license attached.

Upload file button clicked: Yes
File names:
driver_license.jpg



System Log:

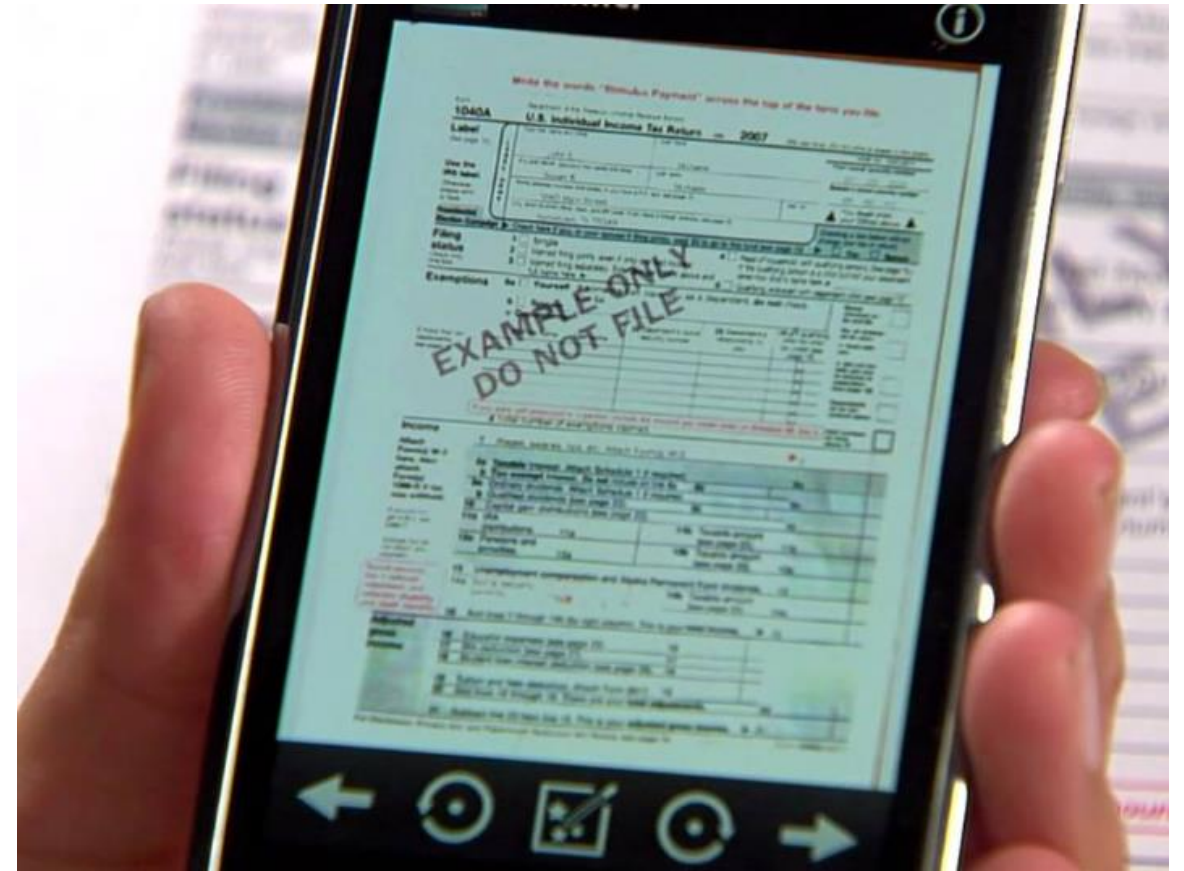
Temporary folder path Created: \temp74682938\fb5272c438e04a33a676bf2e1cc6a74d

File, CDL.jpg added to temporary folder

\temp74682938\fb5272c438e04a33a676bf2e1cc6a74d\CDL-20.jpg: File path attached to email

Why did we create OCTOPUS?


- Easier to use
- Prevents churn
- Mobile-friendly
- No Wrong Door policy
- Convenience with security
- Easier to find
- Customizable



How did we create it?

- Researched options & security requirements
- Consulted stakeholders
- Created plan, got quote & approval
- Created business process
- Created & tested sandbox version
- Soft go-live
- Staff training
- Continuous improvement process

County of Santa Barbara



**DEPARTMENT OF SOCIAL SERVICES
ADMINISTRATIVE DIRECTIVE**

Title: **Verification Process for GetCalFresh and OCTOPUS**
Implementation Date: **01/01/2018**
Revised Date:
Number: **Admin AD 18-101**

DEPARTMENT WIDE IMPACT:	
AOP Support	Reviewed: Incorporate into business processes
APS/CWS	Reviewed: No known impact
CalFresh	Reviewed: Incorporate into business processes
CalWIN	Reviewed: Incorporate into business processes
CalWORKs	Reviewed: Incorporate into business processes
Document Imaging	Reviewed: Incorporate into business processes
Fiscal	Reviewed: No known impact
Foster Care	Reviewed: No known impact
General Relief	Reviewed: Incorporate into business processes
Hearings/Collections/IEVS	Reviewed: Incorporate into business processes
IHSS	Reviewed: No known impact
Medi-Cal	Reviewed: Incorporate into business processes
Staff Development	Reviewed: Incorporate in training module
Stockroom	Reviewed: No known impact
Systems	Reviewed: Incorporate into business processes

FILING INSTRUCTIONS:
Administrative Directives, Miscellaneous

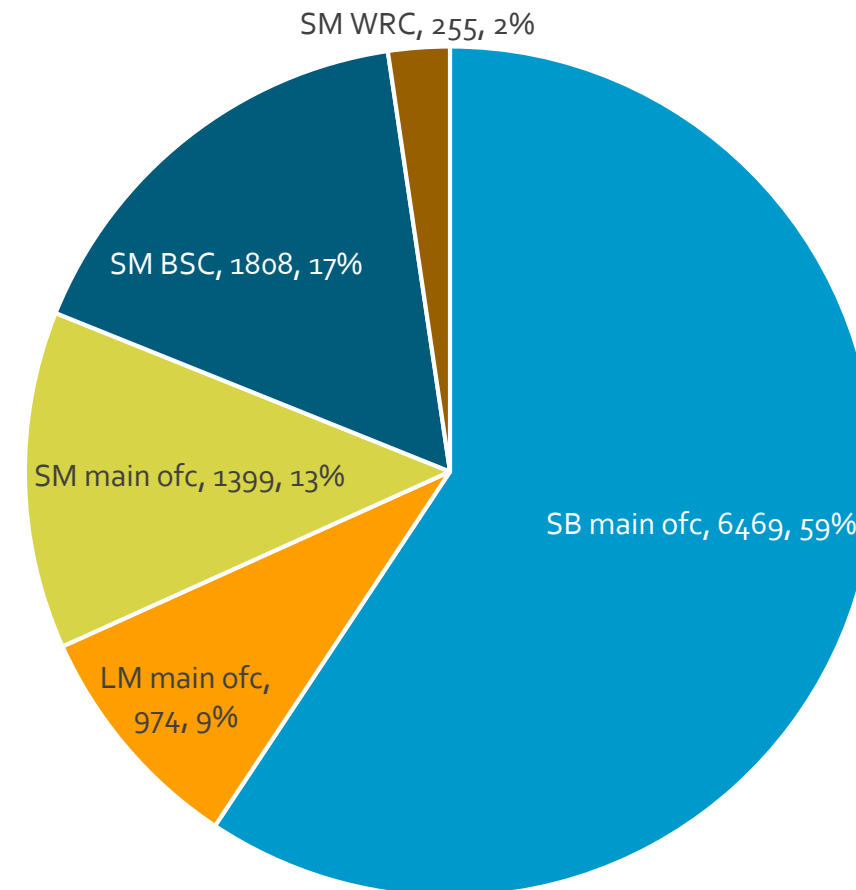
PROGRAM ANALYST REFERENCE:
CalWIN Strategic and Program Initiatives Meeting

DSS AD Identifier: ADMIN AD 18-101
Implementation Date: 01/01/2018
Revised Date: Page 1 of 8

Outcomes

- Very popular with clients, staff, CBO partners
- Helps improve efficiency, improve service, reduce churn
- Ties to County Renew '22 goals
- Cited as model by CDSS

Octopus & GetCalFresh document submissions, July-October 2018 (~75% Octopus)



Lessons learned

- Software development is iterative
 - Research, offer MVP; revise per feedback
 - Users make mistakes; revise to mitigate them
 - Unforeseen issues arise; expect them
- You'll want to make changes on the fly.
Plan, contract, budget, and support accordingly.
- You need a continuous improvement process.

DSS / Formulario de contacto

Envíenos un correo electrónico



Puede usar este formulario para enviar un mensaje por correo electrónico de manera segura al Departamento de Servicios Sociales del Condado de Santa Bárbara. Si lo desea, puede adjuntar un documento (tal como un talón de cheque, recibo de renta, factura de servicios públicos, etc.) desde su computadora o desde la cámara de su teléfono.

Comuníquese con el administrador del sitio web si tiene algún problema con este formulario: [County Webmaster](#)

Español

English

Por Favor, díganos con qué le ayudaremos:

¿Con cuál programa?

- MediCal
- CalFresh (Estampillas para Comida)
- CalWORKS / Welfare to Work / CalLearn
- General Relief (Asistencia General)
- Otro

Asunto:

- Acerca de una nueva solicitud
- Acerca de un caso existente

Numero de caso, si lo conoce: (opcional)

Por favor ingrese el numero de su caso

¿Dónde puedo encontrar esto?

Por Favor, díganos quien es usted y cómo contactarlo:

Promotion

- Flyers & posters
- Stickies & stickers
- Stressballs & more



SEND DOCUMENTS ONLINE

with OCTOPUS

Now there's an easier way to submit verification documents to the Santa Barbara County Department of Social Services (DSS) for your application or case. Meet Octopus!

Visit DSSoctopus.com to send us documents instantly online—by attaching or photographing them with a smartphone. You can also use Octopus to send us a message.

Octopus is for CalFresh, MediCal, General Relief, and CalWORKs. You don't have to create an account or



ENVIAR DOCUMENTOS POR INTERNET

con PULPO



Ahora hay una manera más fácil de enviar los documentos de verificación al Departamento de Servicios Sociales (DSS) del Condado de Santa Bárbara para su solicitud o caso. ¡Conoce a Pulpo!

Visite DSSpulpo.com para enviarnos documentos en línea al instante, adjuntándolos desde una computadora o fotografiándolos con un teléfono inteligente o tableta. También puede usar Pulpo para enviarnos un mensaje sobre su solicitud o caso.

Octopus es para CalFresh, MediCal, General Relief y CalWORKs. Octopus es seguro y no tiene que crear una cuenta ni descargar nada para usarlo.

(Octopus es una de las tres maneras de enviar documentos en línea. Si lo prefiere, puede enviar documentos con GetCalFresh.org si ha solicitado CalFresh, o con MyBenefitsCalWIN.org si crea una cuenta MyBenefitsCalWIN).

Technology-based solutions

- Moving forward, we are embracing technology-based solutions for customer service.
 - The Equalizer, CFUP, centralized inboxes
 - Telephonic signatures, call recording, mass notifications, inbound/outbound surveys based on District Offices
 - Exploring direct email, expansion of OCTOPUS to Adult Services, greater use of text messaging
 - Binti foster care management modules, online SAR-7, upcoming Renew '22 initiatives, etc.





OCTOPUS

THANK YOU!
