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

IMPROVING THE CUSTOMER EXPERIENCE WITH

OCTOPUS

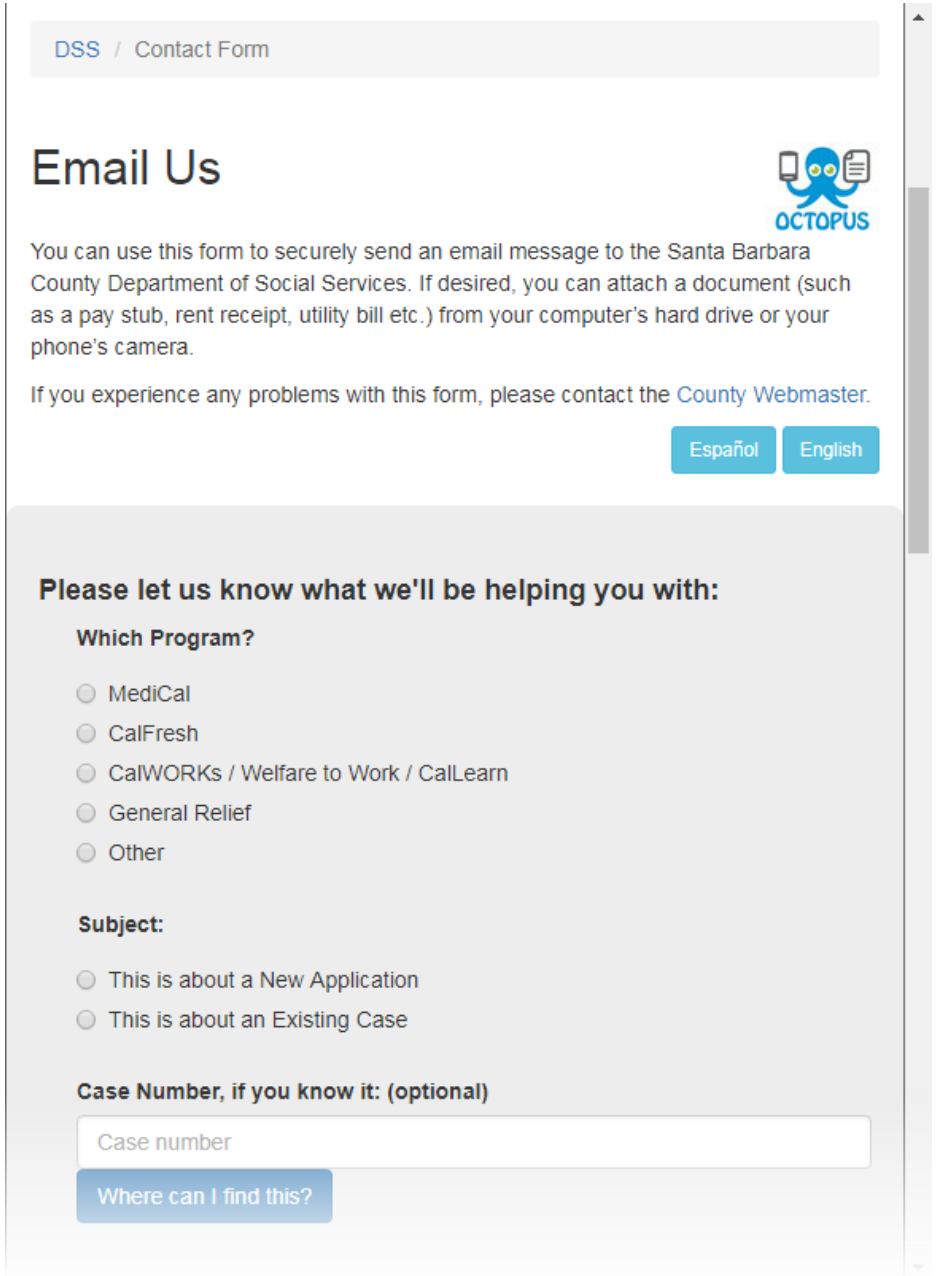
SOCIAL SERVICES

HEALTH SECURITY SAFETY

OCTOPUS

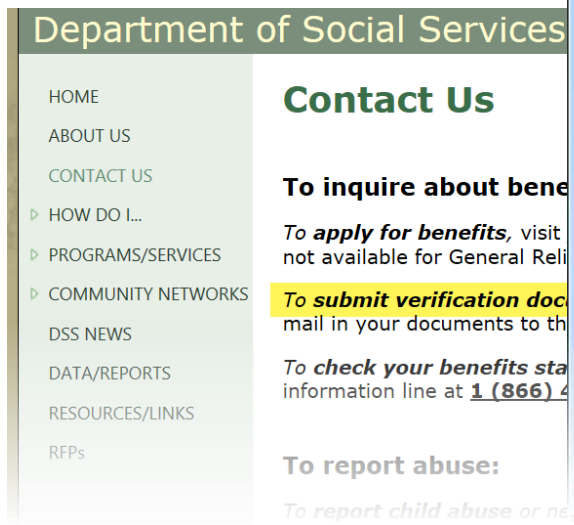
What is OCTOPUS?

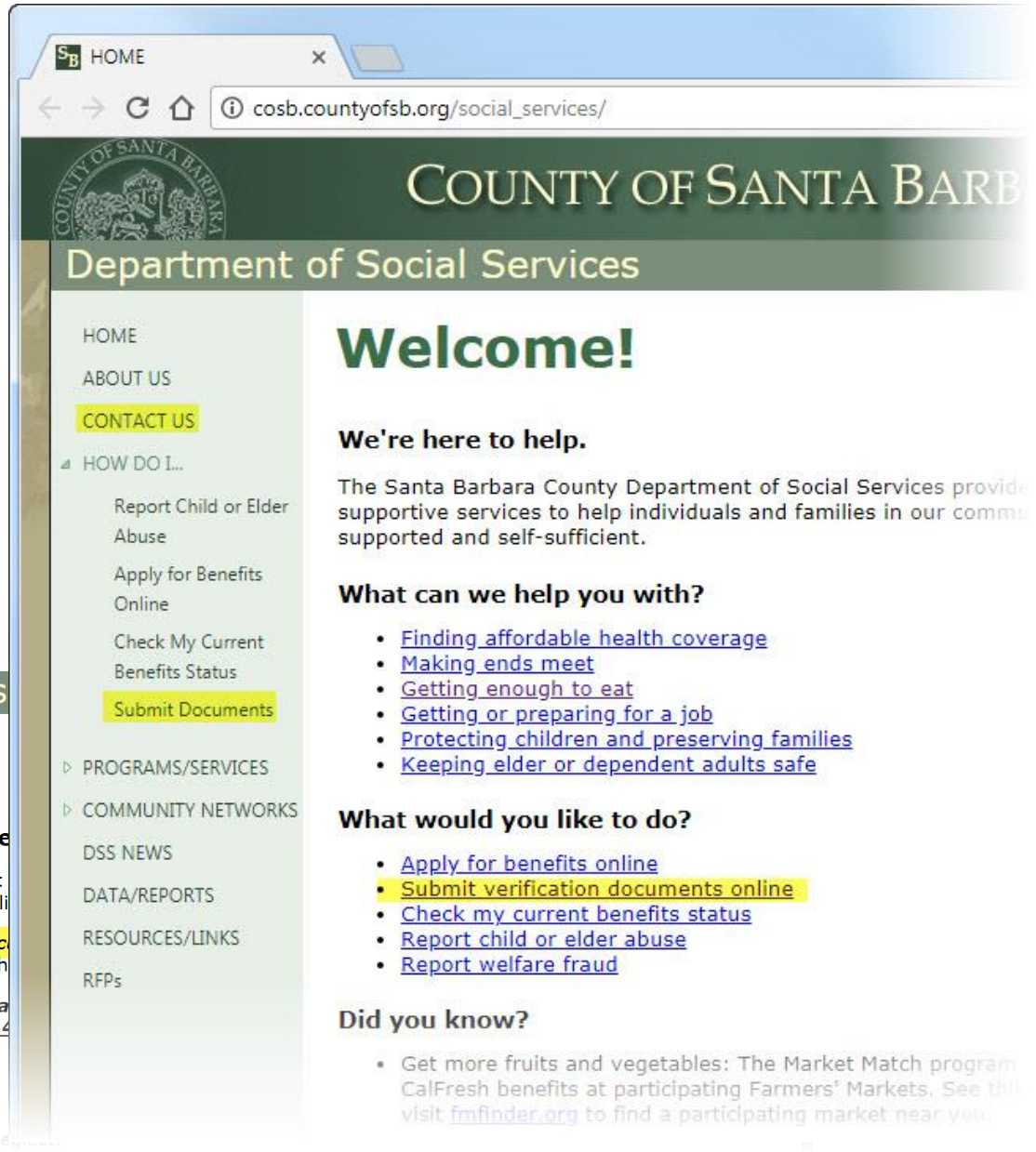
- A form on our website that lets clients:
  - Submit verifications for any eligibility program.
  - Inquire about their case or application.
- Can be used securely from any computer or mobile device.
- The client does **NOT** need to set up an account or download an app.



Where is OCTOPUS?

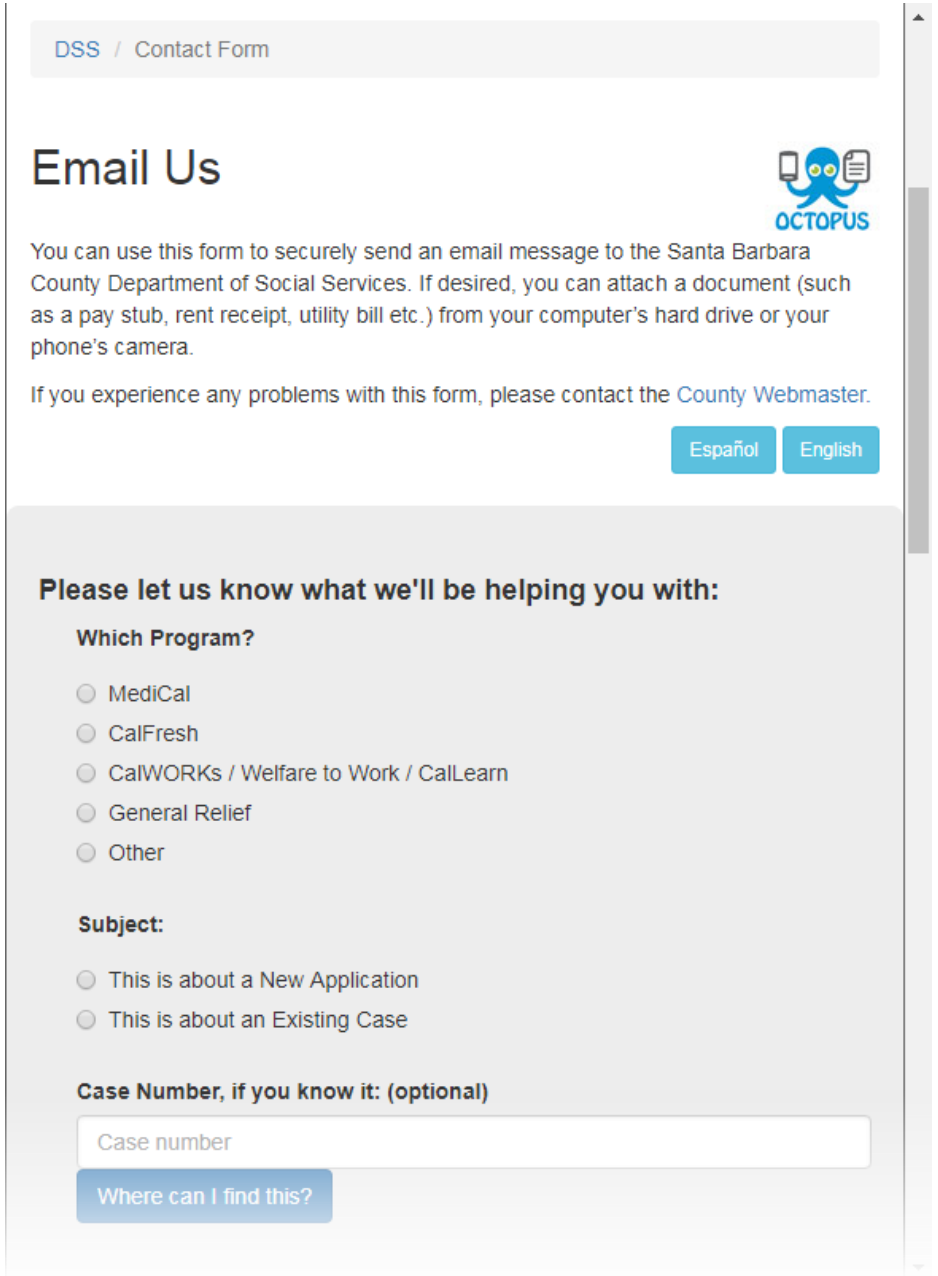
- Access by links on the DSS website (home page, menu, contact page)
- Access directly at DSSoctopus.com





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



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?

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

Which Program?

- (•) MediCal
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- ( ) 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?

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:

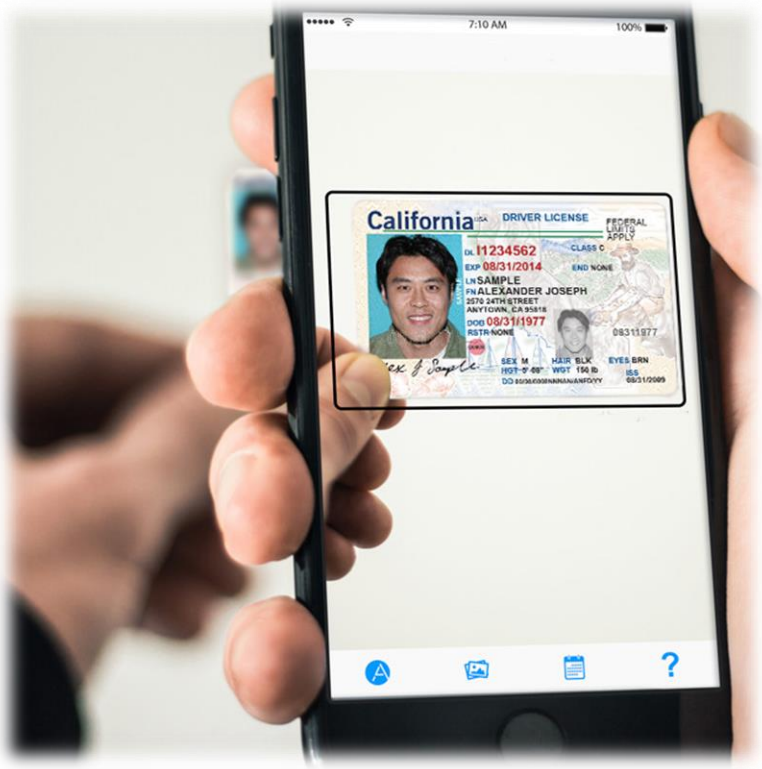
Please only send images (photos) or PDF documents.

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.



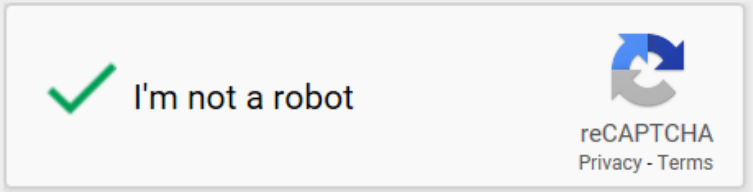
Please let us know where to send this message:

Send this message to:

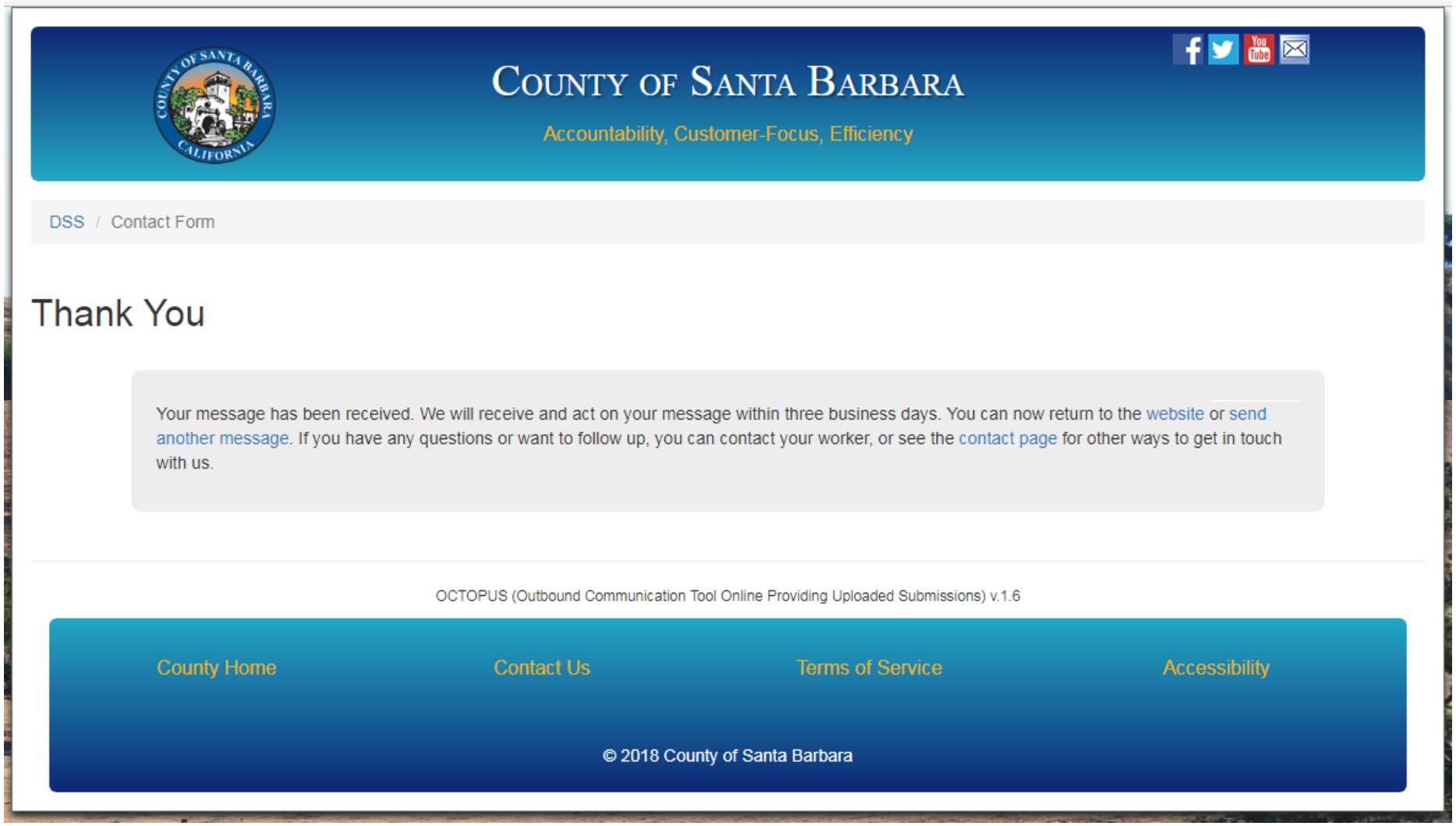
- ○ Benefit Service Center
- ◉ Santa Barbara main office
- ○ Lompoc main office
- ○ Santa Maria main office (Betteravia / Centerpointe)
- ○ Santa Maria Self-Sufficiency office (Broadway)

Ready to Send!

Final Verification:



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
© 2018 County of Santa Barbara

DSS Shared SB Inbox - Inbox - DSS Shared SB Inbox - Outlook

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

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

New | Delete | Respond | Quick Steps | Move | Tags | Find | Add-ins

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

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

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

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

REPLY | REPLY ALL | FORWARD | ...

Mark as unread

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

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.

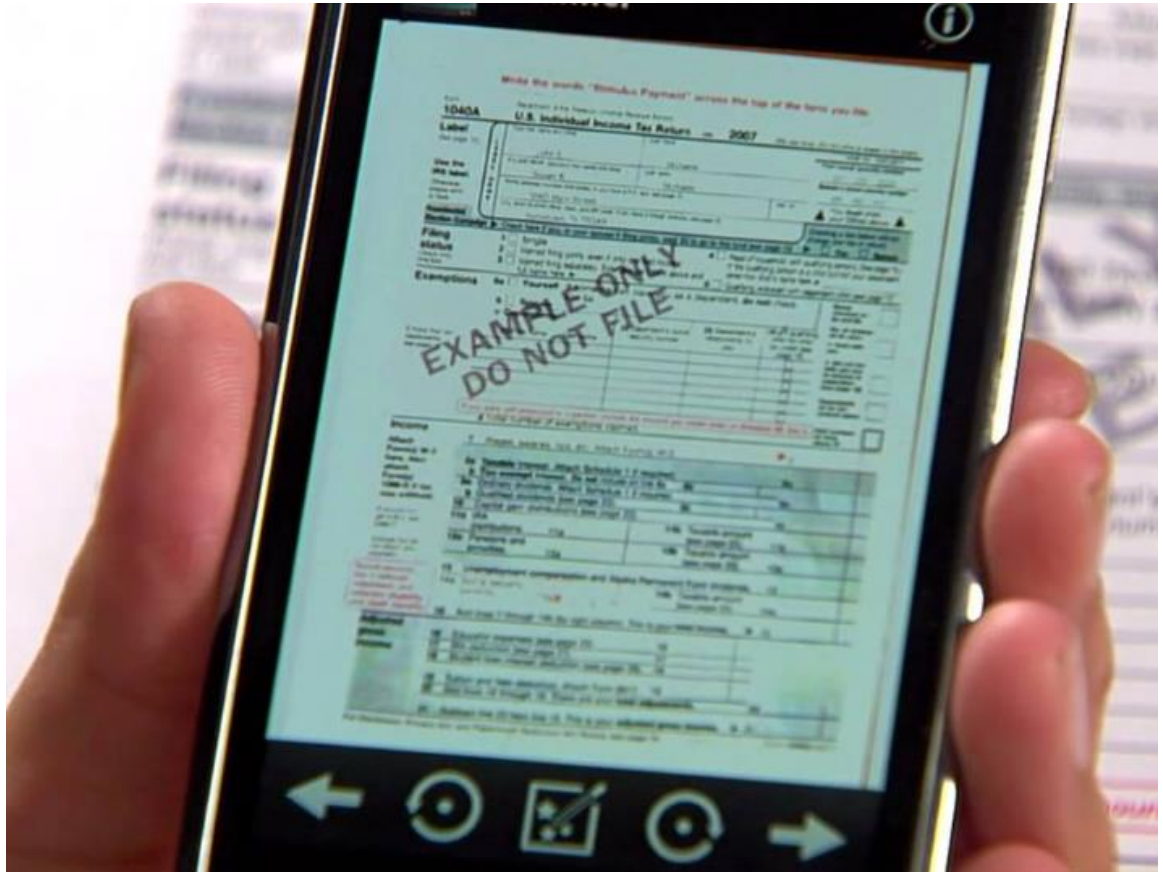
Upload file button clicked: Yes
File names:
driver_license.jpg

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

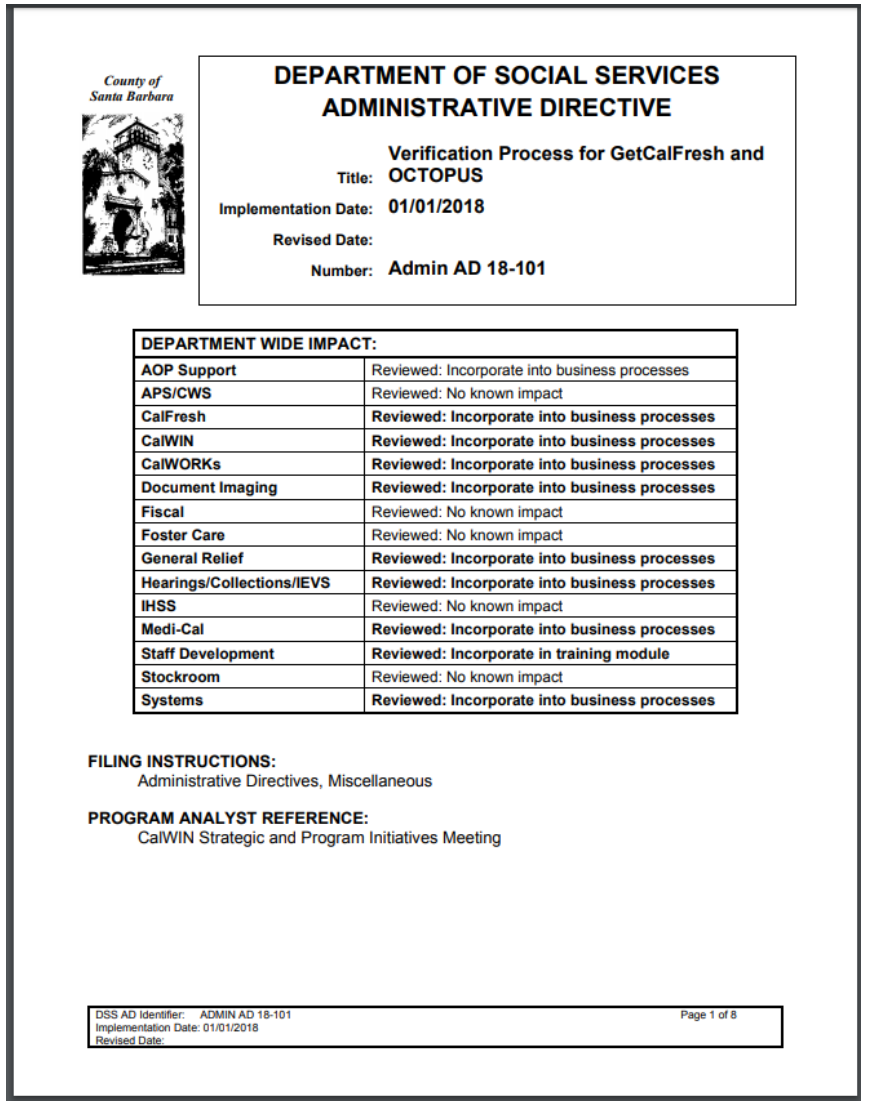
Why did we create OCTOPUS?

- 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

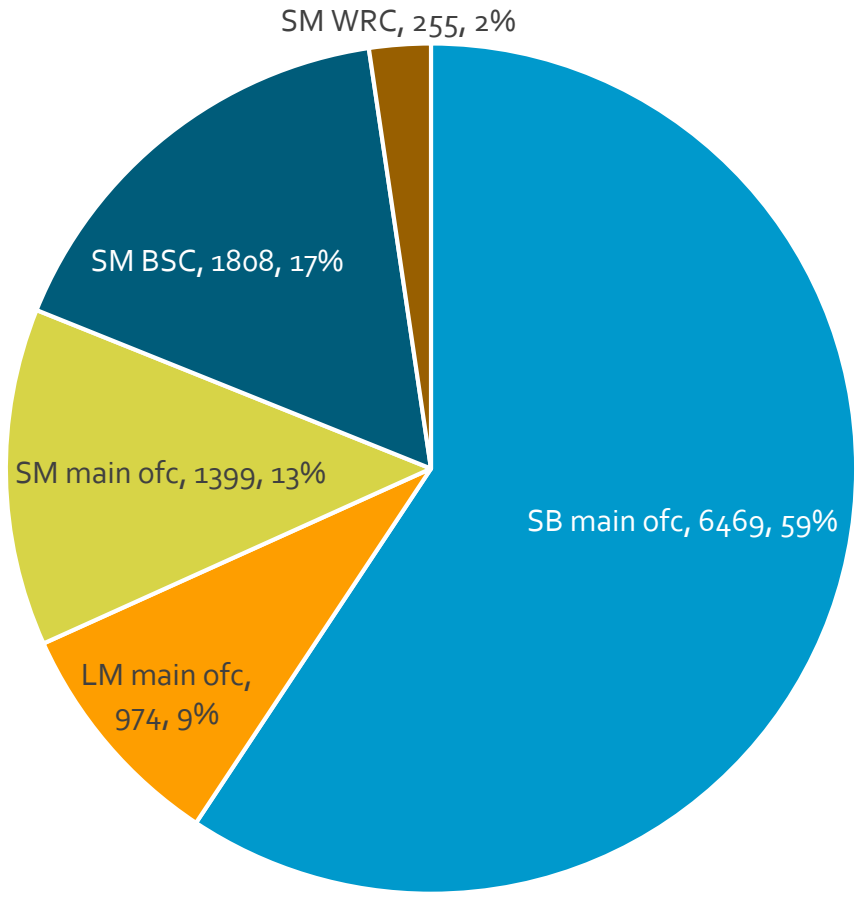
PROGRAM ANALYST REFERENCE:
CalWIN Strategic and Program Initiatives Meeting

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

Outcomes

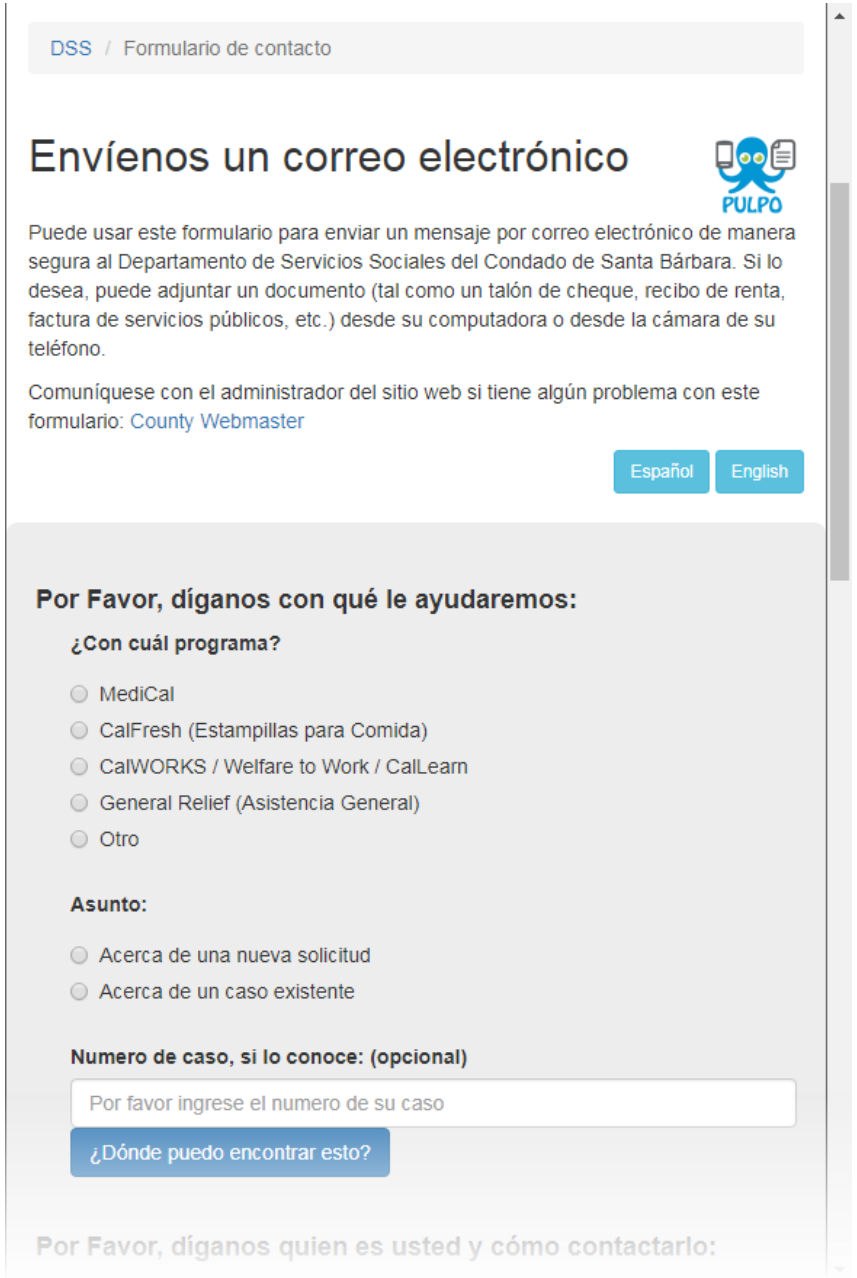
- Very popular with clients, staff, CBO partners
- Helps improve efficiency, improve service, reduce churn
- Ties to County Renew ‘22 goals
- Cited as model by CDSS

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.



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 attachi… or photographing them with a smart… so use Octopus to send us a mess… ase.

Octop… General Relief, and CalWORKs.
Octop… t have to create an account or
down…

Octopus …
you hav… you

OCTOPUS

ENVIAR DOCUMENTOS POR INTERNET

con PULPO

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!