

HOME

Call Specialist Manual

2-1-1/United Way Monterey County
California American Water Program

March 2018 edition v2

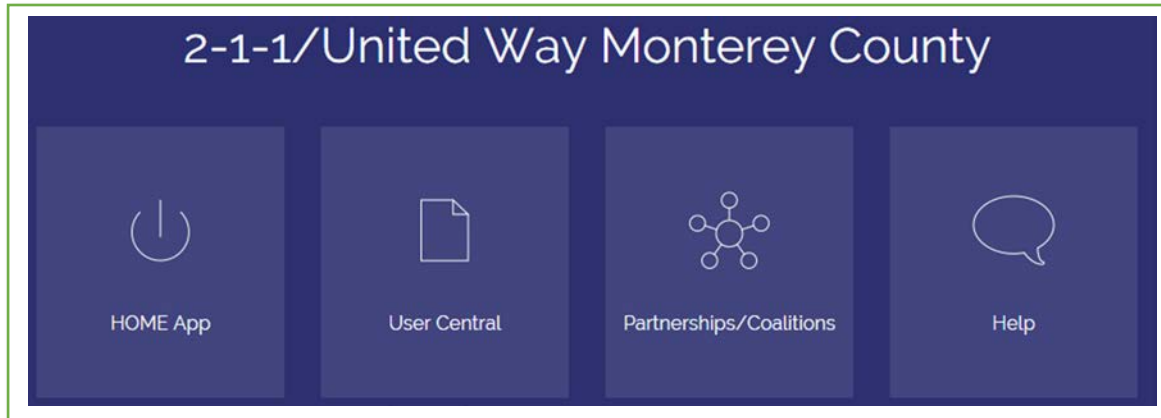
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| Access HOME

The Landing Page provides access to HOME, documents and workflow manuals, links to 211/United Way sites, and access to the CTA Help Desk.

Landing Page link: ctagroup.org/2-1-1-united-way-monterey-county/



HOME App: click to access the HOME login page

- Click "Sign In with HMIS"
- Enter Username (typically an email address) and Password
- Click "LOGIN"

User Central: click to access forms and documents

Partnerships/Coalitions: opens Monterey County Collaborative site

Help: click to access the Help Desk to ask CTA a question or to seek assistance

Forgot password?

- Click "Forgot password?"
- Message will display: "Please provide your username and your new password will be sent to the registered email address."
- Enter Username
- Click "Submit"
- Check your email account and follow the prompts detailed in the email

Need additional assistance?

Click the Help icon on the Landing page.

Link: ctagroup.org/2-1-1-united-way-monterey-county/2-1-1-help-desk/

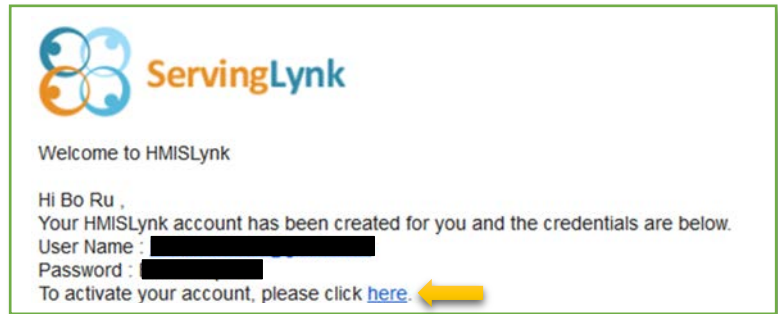
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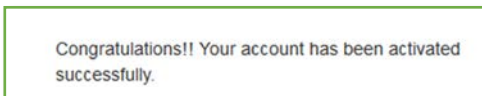
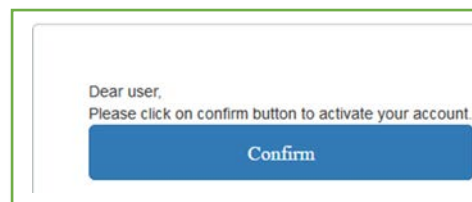
| Access HOME: First Time

The steps outline on this page only occur the first time you access HOME.

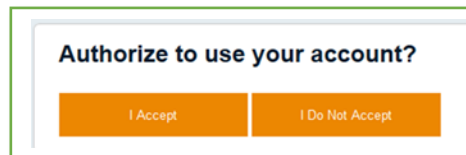
- An email is sent to your address requesting that you activate your account
- Click here (yellow arrow).



- A page appears asking you to Confirm.
- You will then receive this message:



- Then go to the HOME log-in page. If you have not already bookmarked the HOME page, here is the link: <https://mc211.ctagroup.org/>
- Enter in your username and password
- A pop-up window appears
- Click "I Accept"
- The Dashboard appears



The steps outline above only occur the first time you access HOME. All future HOME access attempts:

- Go to the HOME log-in page
- Enter username
- Enter password

Dashboard

1

2

1

2

Dashboard as it appears on an Apple iPad Mini

1

2

Menu bar: displays the Admin functions, Click a function to access that function.

Dashboard; displays Admin icons. Click

Resize tool

Click  (yellow arrow) to collapse/expand the Menu Bar.

What is the functionality of each of feature?

Pending clients

Search for existing clients, add new clients, clients with an incomplete questionnaire.

Responses

Lists all clients with a completed questionnaire, regardless of their eligibility status.

| Questionnaire Workflow

A call is received from a Monterey County resident seeking Cal Am assistance:

① Access HOME using your login credentials to display the Dashboard

② Click Pending Clients

Search Existing Client page appears.

- Enter client's first/last name (green arrow). Possible matches may appear.

Client in system? If there is a possible match, a list of name(s) will appear. Click on match to access client's file.

Client not in system?

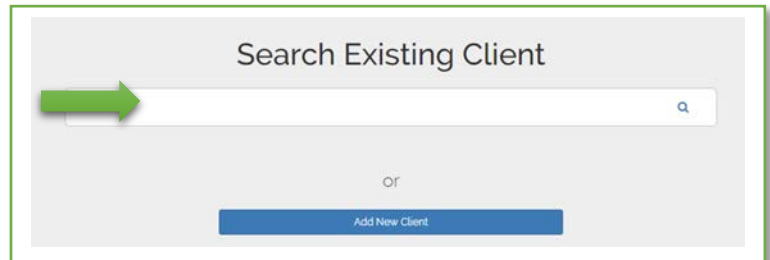
Proceed to step 3

③ Click Add New Client

- Preliminary Survey appears
- Ask client both ?s
- Click **Yes**: If client is a customer and has contacted customer service
- Click **No**: If client is not a customer and/or has not contacted customer service

Clicking Yes: takes you to Client Profile page

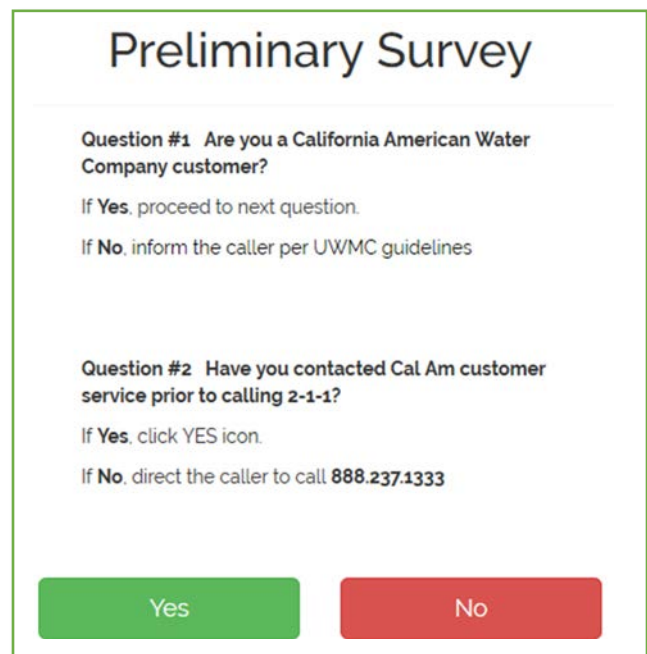
Clicking No: returns you to the dashboard



Search Existing Client

or

Add New Client



Preliminary Survey

Question #1 Are you a California American Water Company customer?

If **Yes**, proceed to next question.
If **No**, inform the caller per UWMC guidelines

Question #2 Have you contacted Cal Am customer service prior to calling 2-1-1?

If **Yes**, click YES icon.
If **No**, direct the caller to call 888.237.1333

Yes No

| Questionnaire Workflow

④ Client Profile page

Clicking Yes on the Preliminary Survey page takes you to the new Client page.

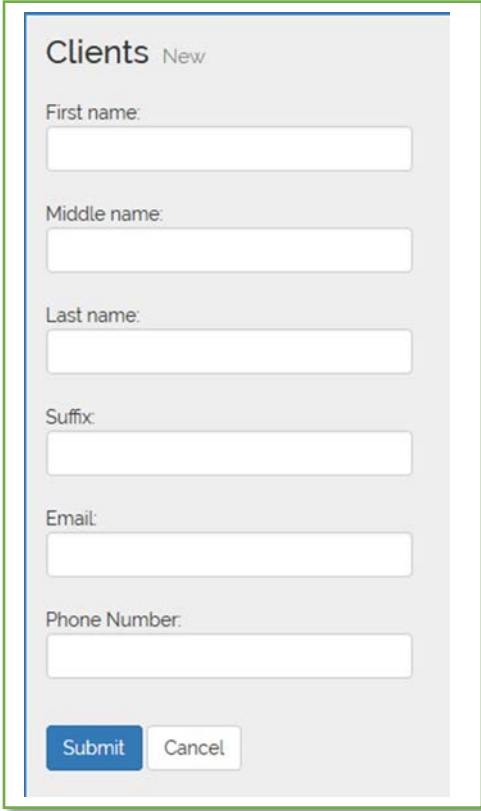
Creating a new client creates a unique client ID for that client.

Creating the Client Profile

1. Enter First Name, and Last Name
2. Enter Email
3. Enter Phone Number.
4. **Middle name and Suffix are optional**

Click **Submit**

Clicking Submit takes you to the Select Survey page.



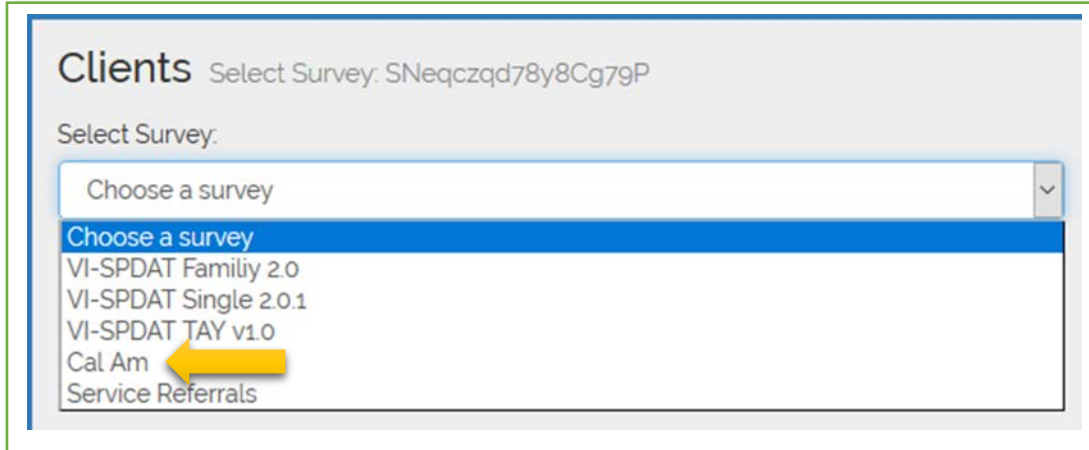
The screenshot shows a web form titled "Clients New". It contains the following fields and buttons:

- First name:
- Middle name:
- Last name:
- Suffix:
- Email:
- Phone Number:
- Submit button (blue)
- Cancel button (white)

| Questionnaire Workflow

5 Client Survey page

Choose a survey: click to reveal a drop-down menu of survey choices



The screenshot shows a web interface titled "Clients" with a sub-header "Select Survey: SNeqczqd78y8Cg79P". Below this is a "Select Survey:" label and a dropdown menu. The dropdown menu is open, showing a list of survey options. The first option is "Choose a survey" (highlighted in blue). Below it are "VI-SPDAT Family 2.0", "VI-SPDAT Single 2.0.1", "VI-SPDAT TAY v1.0", "Cal Am" (indicated by a yellow arrow), and "Service Referrals".

- Select **Cal Am** (yellow arrow)
- Click **Next**
- Selected survey loads
- Client data already entered (example: First Name) will display in survey

6 Complete Survey

- The Cal Am survey contains 20 questions
- Two options at bottom of survey
 - **Upload survey:** click to upload the survey to data warehouse
 - **Pause survey:** click if survey not complete and client has asked to complete at a later time

| Post Questionnaire Submission

What happens after the Call Specialist clicks submit and the client file is uploaded to the warehouse?

- Email #1 or #2 sent is automatically sent to client, Cal Am and United Way.
- Email #1 is sent if client in arrears but has not received a 3 day notice
- Email #2 is sent if client is in arrears and has received a 3 day notice. Clients with a 3 day notice have 48 hours to submit required documentation to United Way.
- Match determines if client is eligible. If eligible, client goes to Active List. If not eligible, client goes to Responses.

United Way (waterhelp@unitedwaymcca.org) will upload documentation to client emailed or faxed to United Way. If the client is eligible for financial assistance, United Way sends email #3. If client not eligible, United Way will send email #4.

- Once requested documentation received and uploaded, the Administrator, clicks "Send Email #3" to client, United Way and Cal Am, stating client is eligible for financial assistance.
- If documents not in order, or if client deemed not eligible for other reasons, United Way will issue email #4 to client, United Way, and Cal Am.

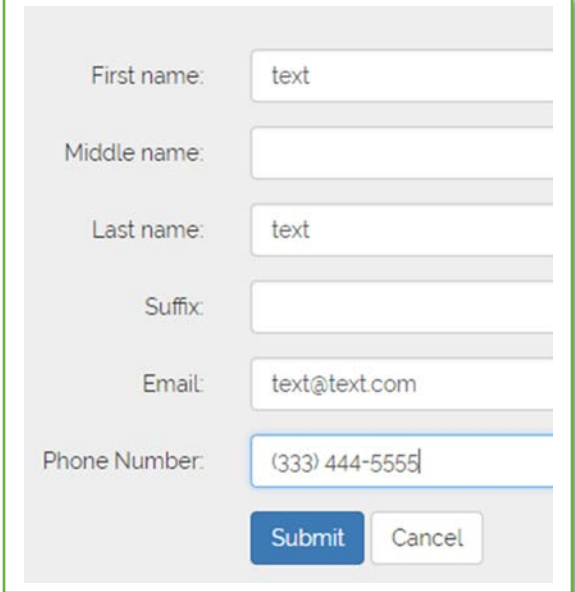
| Edit Client Profile or Questionnaire

Need to edit First Name, Last Name, Email or Phone Number?

- Go to Responses
- Locate client
- Click on client's name
- Delete existing text
- Type in correct text
- Click Submit

Need to edit Questionnaire (all other questions?)

- Go to Responses
- Locate client
- Click on Cal Am (to left of client's name)
- Edit or update as needed
- Click Re-Upload Survey (bottom of page)



The screenshot shows a form for editing a client profile. It contains the following fields and buttons:

- First name: text
- Middle name: (empty)
- Last name: text
- Suffix: (empty)
- Email: text@text.com
- Phone Number: (333) 444-5555
- Submit button (blue)
- Cancel button (white)

| Email Notification

Detailed below are the various emails that the caller, Cal Am, and 211 UWMC will receive as the caller's application for assistance is processed.

Email # 1

Application Receipt (automatically to the Customer, Info copy to Cal Am and UWMC at time of Intake submission)

Date:

Subject: Application Receipt, Cal Am Water Hardship Benefit Program

Account: _____

Dear Customer:

Thank you for your application, it has been received. Your next step is to submit the necessary documentation discussed in your phone interview to support the application. It is important that this documentation be received within 48 hours of your phone call to continue processing the application. Timeliness is very important. Without the supporting documentation, the application process will end and the application rejected.

Documentation should be submitted by email to waterhelp@unitedwaymcca.org or by fax to (831) 372-4945 no later than (DATE).

Sincerely,

United Way Monterey County

Email #2

Application Receipt 3 Day Notice (Automatically to the Customer, Info copy to Cal Am and UWMC at time of Intake submission)

Date:

Subject: Application Receipt, 3 Day Notice of Water Shutoff

Account: _____

Dear Customer:

Thank you for your application, it has been received. We have notified Cal Am and a temporary hold has been placed on the work order that would have shut off your water. The next step for you is to submit the necessary documentation discussed in your phone interview to support your application. It is important that this documentation be received within a couple of days of your phone call in order to keep your water from being shut-off.

Failure to do so will result in the temporary hold being removed and work will proceed to shut off the water. Documentation should be submitted by email to waterhelp@unitedwaymcca.org or by fax to (831) 372-4945 no later than (DATE).

Sincerely,

United Way Monterey County

| Email Notification

Detailed below are the various emails that the caller, Cal Am, and 211 UWMC will receive as the caller's application for assistance is processed.

Email # 3

Application Approval (To the Customer, Info copy to Cal Am and UWMC. To be sent by UWMC staff, if appropriate and when the Intake form and supporting documents have been joined.)

Date:

Subject: Application Approval, Cal Am Water Hardship Benefit Program

Account: _____

Dear Customer:

Thank you for your application. We are pleased to let you know that it has been reviewed and approved. You will see payment made on your behalf on your next billing statement in the amount that due, up to the limit of the benefit program.

The Cal Am Water Hardship Benefit Program is funded by a grant from Cal Am to United Way Monterey County.

Sincerely,
United Way Monterey County

Email #4

Application Rejection (To the Customer, Info copy to Cal Am and UWMC. To be sent by UWMC staff, if appropriate and when the Intake form and supporting documents have been joined.)

Date:

Subject: Ineligible for Cal Am Water Hardship Benefit Program

Dear Customer:

Account: _____

After reviewing your application, we regret that it doesn't meet the criteria for approval. If you would like to review this decision, please contact Monterey County United Way at (831) 372-8026. We have notified California American Water regarding the rejection of your application. You should reach out to them immediately to discuss a different payment arrangement or options.

Sincerely,
United Way Monterey County