Modernizing Call Center and Customer Support Systems Serving California's Medi-Cal Beneficiaries
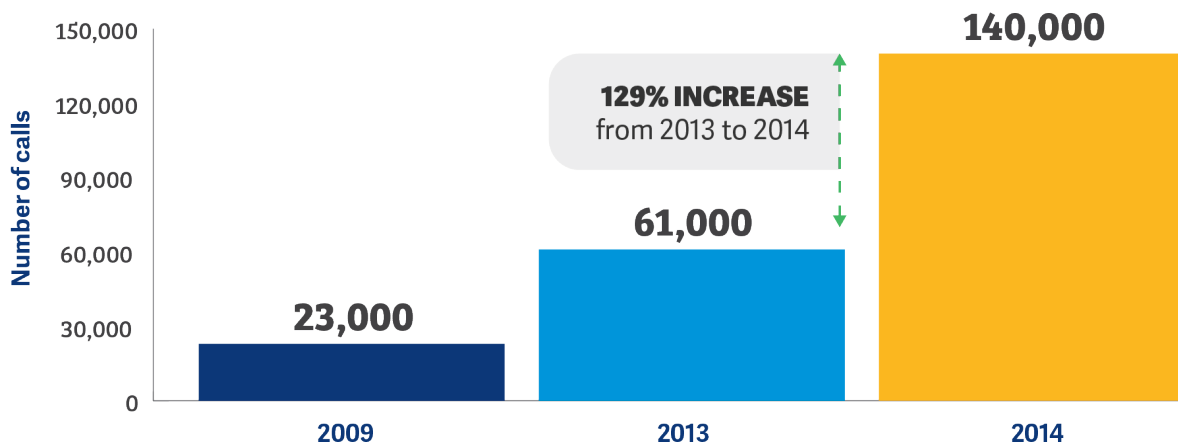
Case Study

The Client
California Department of Health Care Services (CA DHCS) Office of the Ombudsman (OMB)

The Project
Customer Relationship Management (CRM) System Integration Services

The Opportunity

The OMB serves as a neutral party in resolving issues between Medi-Cal beneficiaries and the state contracted health care plans. In 2009, OMB implemented an on-premise CRM system for their inbound call center, which, at the time, was receiving about 23,000 calls per year. Over the next four years, OMB experienced a steady growth in call volume year over year, reaching 61,000 calls in 2013. Then, from 2013 to 2014, OMB's call volume skyrocketed to over 140,000 calls (a 129% increase). The call center's volume has not dropped below 120,000 since 2014.

Having been designed to meet OMB's needs at a much smaller scale, the CRM system could not keep up. Manual data entry from the Medi-Cal Eligibility Data System (MEDS) into OMB's CRM became exponentially more time consuming and cumbersome. System capacity and performance issues led to latency that stifled the users' ability to manage cases and generate reports concurrently. The functionality OMB needed to support their growth was not there and the system had been built in a way that did not allow DHCS to customize it to meet their needs.

With the decommissioning of the CRM server scheduled for January of 2020, DHCS decided to modernize OMB's system and explore cloud-based CRM solutions. Ultimately, DHCS chose to implement Salesforce and selected Public Consulting Group (PCG) to architect, configure, customize, and integrate the new solution to support its OMB call center.

The Solution

PCG used an iterative approach to guide OMB through the full system development life cycle (SDLC): from identifying their growing pains, to gathering requirements, designing, building, and testing a scalable, sustainable solution to meet their current and future needs.

To ensure the new system's scalability and maintainability, it was delivered primarily using Salesforce Service Cloud configurable functionality and as such, minimal custom code was developed to support a web services integration with MEDS. Another requirement of this new system was enhanced security. Therefore, in addition to the security features offered by Salesforce Government Cloud, OMB's new CRM was also integrated with Azure Active Directory Single Sign On (SSO) for user authentication and Salesforce Shield Event Monitoring was integrated with Splunk to create a system audit trail. Finally, prior to the outgoing CRM's decommissioning, data was extracted from the legacy CRM, thoroughly cleansed, and migrated to the new system via Talend to ensure OMB continues to have access to all their historical records.

Key components of PCG's approach to system integration for this engagement include:

Leveraging off the shelf functionality to reduce both project delivery time and maintenance complexity

Engaging in collaborative system design to ensure maximum system usability for OMB staff

Providing mentorship and training to help OMB staff become capable, invested system owners

Facilitating innovation by coordinating the interdepartmental delivery of the first web service integration with MEDS in the state

Establishing a more stable and reliable system to reduce down time and performance issues

Enabling enhanced and streamlined reporting to better meet OMB's current and future needs

The Result

Analysts no longer need to manually transcribe data from MEDS. Now, with just a few clicks, the MEDS integration provides analysts with over 600 data points for a comprehensive view of beneficiary eligibility, enabling them to provide better and faster service to their constituents.

As Salesforce is a multitenant cloud system, managers are now able to run a variety of mandated and operational reports or create new ad-hoc reports without causing latency or other performance issues – all while analysts are concurrently managing cases, even at peak call times.

Users can quickly and securely log in to the system using SSO from an authorized IP address and any user activity falling outside of normal parameters is logged by Splunk for follow up. Authorized IT users can employ declarative tools to maintain and update the system to meet most of OMB's needs, and are releasing updates on a regular cadence. **Speaking to the successful CRM implementation and PCG's contributions to the project overall, DHCS Application Support Branch Chief Ken Buehler said:**

Today, PCG continues to provide maintenance and operations (M&O) support to OMB including application support, backlog management, and road mapping system enhancement.

To learn more about PCG's integration services, and successful engagements like the OMB CRM implementation, contact us today.

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"The DHCS Enterprise Technology Services Division led the implementation of the first Salesforce CRM solution within the DHCS Managed Care Operations Division in March 2020. With the assistance of the project vendor, PCG, the solution was implemented on time and within the project's scope and budget."

-Ken Buehler,
Chief, Application Support Branch, DHCS ETS