

**County of San Diego, Health and Human Services Agency (HHS)A)  
Eligibility Policy and Procedures Guide**

**WorkWell San Diego (WWSD) Standardized Customer Service  
Process for Family Resource Centers (FRCs) & Community  
Resource Centers (CRCs)**

**Page**

1 of 2

**Effective Date:**

10/01/17

**Background:**

In order for our customers to have the same experience in every Family Resource Centers (FRCs) and Community Resource Centers (CRCs), it is necessary to have standardized business processes.

**Purpose:**

The purpose of this document is to provide guidance to staff on the standardized processes for the Customer Service Team, including the Ambassador Office Assistants and Reception Office Assistants.

**Policy:**

With the implementation of standardized business practices, all FRCs and CRCs are required to have a Customer Service Team and adhere to the below standardized business processes. The Customer Service Team is to be comprised of Office Assistant (OA) Ambassadors, Reception OAs and Human Services Specialists (HSSs) Customer Service. The entire Customer Service Team is to be located in the lobby/reception area of the FRC and CRC.

**Actions:**

**Lobby Flow**

As a customer enters a FRC or CRC, the following steps will occur:

- Customer will proceed through security
- Once through security, all customers will be directed to check in at the Lobby Management system kiosk
  - A “Start Here” sign will be prominently placed near the Lobby Management system kiosk
  - An Office Assistant (OA) also known as the Ambassador will be stationed in the lobby to assist customers in the Lobby Management system selections if necessary. The Ambassador will be a mobile component in the lobby
  - It is the responsibility of the Ambassador to direct lobby traffic flow
- The customer is given a numbered ticket from the Lobby Management system kiosk
- Customers requesting to apply for benefits will be directed by the Ambassador to the application packets in the lobby in order for them to complete while they are waiting for their Lobby Management system ticket number to be called

**Note:** Customers with disabilities or service animals will be directed to select the ADA option on the Lobby Management system kiosk for expedited services

- Customers requesting to turn in verifications will be directed to Reception or the Customer Service HSS who will be responsible for obtaining the verifications and providing receipts
- Customers requesting to speak with a HSS or Supervising Human Services Specialist (SHSS) will be directed by the Lobby Management system to the Customer Service stations
- Customers requesting an Electronic Benefit Transfer (EBT) card will be directed by the Lobby Management system to a Customer Service Representative
- Customers requesting to be fingerprinted will be directed by the Lobby Management system to a Customer Service Representative
- Customers requesting to pick up mail will be directed by the Lobby Management system to Reception

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**Page**

2 of 2

- Customers who arrive for an appointment will be given the appropriate Lobby Management system ticket and directed by the Ambassador to have a seat until ticket number is called
- Customers arriving for all other purposes will be directed as needed
- Customers wishing to file a complaint will be connected to a supervisor or manager

**Customer Service**

Customer Service HSSs will be responsible for processing certain tasks that can be processed within a 15 minute timeframe. Tasks include, but are not limited to:

- Assist customers with questions
- EBT card replacements
- Issue continuing Temporary Homeless assistance
- Address Changes
- Requests for BIC cards
- Incomplete or late SAR7
- Provide customers with forms
- Provide copies of NOAs
- Benefit verification

**Note:** Based upon operational need, Customer Service task processing maybe adjusted as needed.

**Reception**

Reception OAs will be responsible for the following tasks and other duties as necessary:

- Application receipt
- Document receipt
- Distribute forms to customers
- Fingerprinting
- Provide homeless mail to customers
- Other tasks as need and as identified

**Sunset Date:**

This policy will be reviewed for continuance by 10/01/2020

**Approval for Release:**



Rick Wanne, Director  
Eligibility Operations