

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

**QMATIC Lobby Management System**

**Page**

1 of 2

**Revision Date:**

12/21/2017

**Background:**

In order to improve service delivery and provide the highest level of quality service while continuing to maintain customer confidentiality, a Lobby Management System, QMATIC, was installed.

**Purpose:**

To ensure consistency in business processes, Eligibility Operations is providing the following QMATIC Lobby Management system process to be used by all Family Resource Center (FRC) and Community Resource Center (CRC) staff. Utilizing QMATIC ensures faster and appropriate customer directed service.

**Actions:**

When a customer enters a FRC or CRC, the following procedures will occur:

- Once through security, all customers will take a Lobby Management system ticket based on the type of service they are requesting and proceed to take a seat in the lobby until they are called to a workstation

**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
- 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

**Procedures:**

QMATIC tracks each ticket's wait and transaction time for a specific service such as Intakes, RRRs, etc. The accuracy of this measure is dependent on the times at which users perform specific actions in QMATIC. Wait time clock begins when a ticket is issued or when placed back in a waiting queue and ends when the ticket is either called or closed without being called. Transaction time clock begins when the ticket is called from a queue using the "Next" button, "Selectively Picked" from a queue, or when initiating a "Walk Direct" ticket and ends when the ticket is closed, ended, transferred, or recycled. Performing these actions on a ticket correctly is crucial for accurate stats on the various QMATIC reports used for lobby management.

**Procedures to be performed while using QMATIC**

- A ticket is to be called only from the workstation where the customer will be serviced face-to-face
- A "Walk Direct" ticket is to be created when a customer's ticket erroneously gets closed in QMATIC and when face to face with a customer
- A ticket is to be ended, closed, or transferred when the service has been completed. Ending tickets

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

**QMATIC Lobby Management System**

**Page**

2 of 2

prematurely will result in an underreported customer transaction time

**Note:** Tickets called or “Walk Direct” created without the customer present will result in an inflated customer transaction time.

Procedures for Non-scheduled Appointments

Whenever a customer does not respond to the initial call for service, staff will:

- 1) “Recall” utilizing the QMATIC system after 30 seconds from initial call. Repeat the call utilizing QMATIC 3 times before moving to step 2;
- 2) Make a status entry in the ticket “Notes” section in QMATIC.
- 3) “Recycle” the ticket one time if the customer does not respond to the initial call and the recall for service;
- 4) Mark the ticket as “No-Show” after following Procedure steps 1-3 above.

Procedures for Scheduled Appointments

Whenever a customer does not respond to the initial call for scheduled appointments, staff will:

- 1) “Recall” utilizing the QMATIC system after 30 seconds from initial call. Repeat the call utilizing QMATIC 3 times before moving to step 2;
- 2) Make a status entry in the ticket “Notes” section in QMATIC.
- 3) “Recycle” the customer if the customer does not respond to the initial call and the recall for service;
- 4) Transfer the ticket to the “99 Closed Back Up” queue for a period of 15 minutes if the customer does not respond to the recycle call for service;
- 5) Review and track the ticket in the “99 Closed Back Up” queue after it is transferred. Mark the ticket as “No-Show” at the expiration of the 15 minute hold from the “99 Closed Back Up” queue.

**Note:** At the end of the day, the “99 Closed Back Up” will need to be cleared.

**Note:** No use of overhead speakers will be used. Only QMATIC will be used to page customers.

Program Impact/s:

FRC and CRC Lobby Policy

References:

- WorkWell San Diego (WWSD) Standardized Customer Service Process for Family Resource Centers (FRCs) and Community Resource Centers (CRCs)
- WorkWell San Diego (WWSD) Standardized Intake Process

Sunset Date:

This policy will be reviewed for continuance by 03/31/2020

Approval for Release:



Rick Wanne, Director  
Eligibility Operations