PUBLIC ADVOCATE FOR THE CITY OF NEW YORK

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Constituent Services Procedural Manual

The purpose of this manual is to help outline Constituent Services procedures for conducting Intake and outreach on behalf of the Public Advocate's constituency.

CRM Data System - Customer Relation Management System

- iConstituent (iCon] is the CRM Software used by the Public Advocate's Office, which allows an entire case to be centralized under one platform:
    - All-in-one integrated platform
        - In-App (text messages) and Email Notifications from constituents
        - Remote workers can access and share data.

<u>Voice Message Intake Process</u>

- Calls come in through our Constituent Services Hotline.
    - Associates are assigned various times to monitor the hotline.
    - The hotline only goes live or is activated when the Associate dials in with the proper code on their office phone to switch over from their office direct line.
    - Associates field live calls on hotline between the hours of 9am and 5pm Monday through Thursday.
    - The Associate gathers the details of the inquiry along with the constituent's first and last name spelled correctly and their phone number. Emails can often be taken as well.
- The Associate will then enter the case into our CRM system which is iConstituent.
    - Once in iConstituent, the first step is to search for the person within the system. This is accessed by clicking on "People" which is the small "head and shoulders" icon in a group of three on the lower part of the screen just to the left of the center section of the screen. Those three icons are "people" where one accesses the database of contacts in the system, "services" where one accesses the cases assigned to them as well as their resolved cases, and the third icon is for "inbox" where one would receive direct messages sent to them within the iConstituent system. **While working remotely our office has not been utilizing the inbox or in-system messaging function.**
    - If the person is not in the system, one would input their information by going to the top of the screen just to the left of the center and clicking on the plus sign (+). This is where one can add a new "person" or open a new "service."
    - Once the person is in the system, one opens a new "service" for them. When you open the page to start a new service, you will search the name of the constituent you are opening a new service for and anyone with that name will come up and you verify the contact with the corresponding information.
    - There is a description box to enter details or subject matter of the case.
    - Then there is a box for "assignee: This is where one assigns the case. The case is assigned to either the Director or Deputy Director, whomever must determine which Associate the case is officially assigned to work.
        - The case assigner (Director/Deputy Director) determines how to assign the cases based on the agency and nature of complaint.

  - All cases are then “tagged” by the Associate with the appropriate categorical agency tag depending on the issue; for example, NYCHA/Repairs or DCA/ Goods and Services Complaint.

GetHelp, Reception Emails and Social Media Process

GetHelp

- The CRM system automatically generates a case for the constituent emailing GetHelp. Our Intake Clerk assigns all cases from GetHelp to the Director and/or Deputy Director to review and assign to the appropriate Associate.

Reception

- The CRM system captures constituent contact information and a summary of issue, which is then reviewed by the Director of Constituent Services and/or the Deputy of Constituent Services. Constituent summaries are emailed to appropriate Associates for follow up and to create cases.

Social Media Platform Process

- The Public Advocate’s Social Media Platforms are monitored daily by both the Public Relations team and the Director and Deputy Director of Constituent Services. All constituent inquiries/concerns are placed in a shared Constituent Services Document, which includes the constituent’s name, contact information and a summary of the issue. Constituents are assigned to an Associate who conducts a full intake and inputs the case into the CRM system.

Assigned Associates

- Each Associate has agencies and subject matters they focus on which makes up their caseloads.
  - An Associate is still expected to handle any case or assignment involving any agency even if it is outside their usual scope.
    - On the "services" page an Associate sees the cases assigned to them and there is a tab for cases resolved.
    - On the left side one can go from "assigned to me" to the "cases" tab which would switch to all the cases system and search that database.
    - There are also ways in which constituents contact us online through "Get Help." Someone will monitor "Get Help" and input cases from there and assign them to the case assigner to reassign.
    - There is also the "campaign" function in which online inquiries come straight into the system and cases are created. Those are monitored by the Director/Deputy Director and assigned to the appropriate Associate.
  - Notes are added via iCon to document the progress of the case whether they are notes from a constituent follow-up, email correspondence with constituents, or email correspondence with agency representatives.
  - When it is time to resolve a case, which is done by clicking on the "check mark" icon on the upper left corner of the case page, there are three options for closing a case which are "neutral," "favorable," and unfavorable.

- Associates writes a closing note to describe the result of the case.
  - Each case has a six-digit case number for reference.

<u>Intake Process (Remote)</u>

- During the remote work period, there has not been a live hotline. Hotline has been voicemail only.
- Associates are assigned one-hour periods in which they are responsible for retrieving messages on the hotline voicemail, conducting intake and inputting information into iCon. There is also a senior volunteer that retrieves messages left by constituents and inputs the information into the system.
- They can often enter cases into the system from the information provided in the message. If not, they will have to call to complete intake with the same process as described above.

Please note that the same process is conducted for walk-in constituents.

- **Intake Process**
- **Input case into iCon**
- **Case assigned to appropriate Associate by Director and/or Deputy Director.**

Type of constituent information requested by Constituent Services:

- Constituent Name
- Address
- Telephone Number
- Email address
  - Detailed summary of issue

Associate

- Constituent Services Representative

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