Road to Human Services Eligibility
Process Improvement

Using Lessons Learned From ACA Implementation
ACA – Enrollment with an Attitude

Moving the Cheese

- Application Methods
  - Simplification
- Automation
  - Electronic Data Exchange
  - Self Attestation
- Centralized Operations
  - Rules Engine
  - Data Reuse
  - Workflow
Many states are adopting a single-portal approach, enabling individuals to screen, apply for, monitor, and manage their benefits online.

<table>
<thead>
<tr>
<th>Screen</th>
<th>Apply</th>
<th>Monitor</th>
<th>Manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enables users to determine if they are eligible for services.</td>
<td>Enables users to complete an integrated application for health and human services programs.</td>
<td>Enables users to view account status, including benefit information, recent notices, and alerts to missing verifications.</td>
<td>Enables users to report changes to information and complete renewal forms online.</td>
</tr>
</tbody>
</table>

While the public can still submit paper applications and call caseworkers, these features can increase efficiencies in the eligibility process.
Operational and Process Improvement

Modernization of eligibility systems opens enormous doors to improve overall eligibility operations and process

With strained State budgets, aging workforce, and the major expansion of the Medicaid program, the only way a state can remain operational is through automation and well-defined workflow processes. Utilizing new technology and innovative process design, resources can be utilized much more efficiently.

This automation and simplification means that critical health and human services can be delivered to residents more quickly, effectively, and inexpensively.
Process Bottleneck

Applicants for a specific program go down the same tunnel

- Design for the exception
- Inefficient of Resources
- Capacity is not sustainable
- Quality Suffers
- Less effective than it could be
Application Methods - NWD

- **Web Application**
  - 24 hrs/day 7 days /wk
  - Public locations

- **Phone Application**
  - Centralized unit

- **In Person Application**
  - State Agency/Partner

- **Mailed Paper Application**
  - OCR Scanning
  - Centralized Data Entry
Killing Flies with a Hammer

DOC Example

Will Always Reoffend
Will Never Reoffend
Can have impact with Counseling and Education

Oklahoma Blizzard

- 499 applications
- Enrolled/Re-Enrolled 780 Individuals
- 87% Home Internet,
Discrepancies: Sworn Enemies of Automation

- Data Driven Systems – Good, Bad, & Ugly
  - Rethink and Redesign Policy
  - Minimized discrepancy/exception = Automation
  - Action taken to stop something from happening
  - Policy need not impede automation
Electronic Verification

FEDERAL DATA HUB
- Homeland Security
- SSA
- IRS

STATE DATA SERVICES HUB
- State Quarterly Wage Source
- Child Support Enforcement
- PARIS
- DOC
- Other State Agencies
- Vital Statistics
- Work Number
Verification Discrepancies

Hierarchical Decision Tree

Most Trusted

Least Trusted

Date Stamped Self Attestation Auto Mid-Cert Updates
# Electronic Income Verification

<table>
<thead>
<tr>
<th>Applicant</th>
<th>Data Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household</td>
<td>SSN</td>
</tr>
<tr>
<td>HR, WK, MO, YR</td>
<td>Quarter, Annual</td>
</tr>
<tr>
<td>Net</td>
<td>Gross</td>
</tr>
<tr>
<td>Today</td>
<td>Point In Time</td>
</tr>
<tr>
<td>Ease of Use</td>
<td>Calculation Complexity</td>
</tr>
</tbody>
</table>
Automated Mid-Cert Evaluation/Update

1. SSN’s verified?
   - Yes: Mark SSN’s verified
   - No: SSN’s sent to SSA for verification

2. SSN’s sent to SSA for verification
   - SSN’s verified?
     - Yes: Update income & reprocess case
     - No: Manual Process

3. Income?
   - Yes: Date Stamp > Report Date
   - No: Send again in week/month/quarter

4. Date Stamp > Report Date?
   - Yes: Update income & reprocess case
   - No: Eligibility change?

5. Eligibility change?
   - Yes: Suspend/Certify eligibility Send notice
   - No: Manual Process
Final Thoughts…

THE BOX

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