

# Moving Toward a Client Self-Service Model: Understanding the Client Perspective

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# Summary of Self-Service Re-engineering Initiative

- The New York City Human Resources Administration (HRA) began a phased implementation of client self-service model in early 2013.
- The first phase called for piloting the initiative in the SNAP application and recertification processes, though eventually HRA plans to incorporate client self-service in other benefits and programs.

# Summary of Self-Service Re-engineering Initiative

- Key components of the new self-service model:
  - Availability of online SNAP applications (available in NYC since 2010 but efforts are being made to encourage more usage of this tool)
  - Computers in HRA centers that allow applicants to file an application online rather than filling out pen and paper application and waiting to meet with an application processing worker
  - Encouraging phone interviews for application and recertification rather than in-person appointments
  - Eliminating same-day interviews for individuals who file an application in HRA centers (encouraging them to complete all further application processes by phone)
  - Consolidation of mail and phone processing units into HRA centers that coordinate automated processes after the client has submitted his/her application and documents

# Goals of Client Perspective Research

- The key questions that this study answered:
  - Why do certain individuals choose to apply and recertify for SNAP in person at SNAP centers, rather than taking advantage of telephone, Internet, and other remote options (including telephone interactive voice response system where applicable)? Do they know about the other options? What would they choose next time?
  - What are the experiences of individuals who *do* apply or recertify by telephone or Internet? Are they satisfied with the experience? Do they experience any challenges?
  - How do clients respond to self-service computer banks at HRA SNAP Centers? What are the benefits and challenges of this approach in terms of the client experience? What are the implications for application completion and accuracy?

# Research Methods

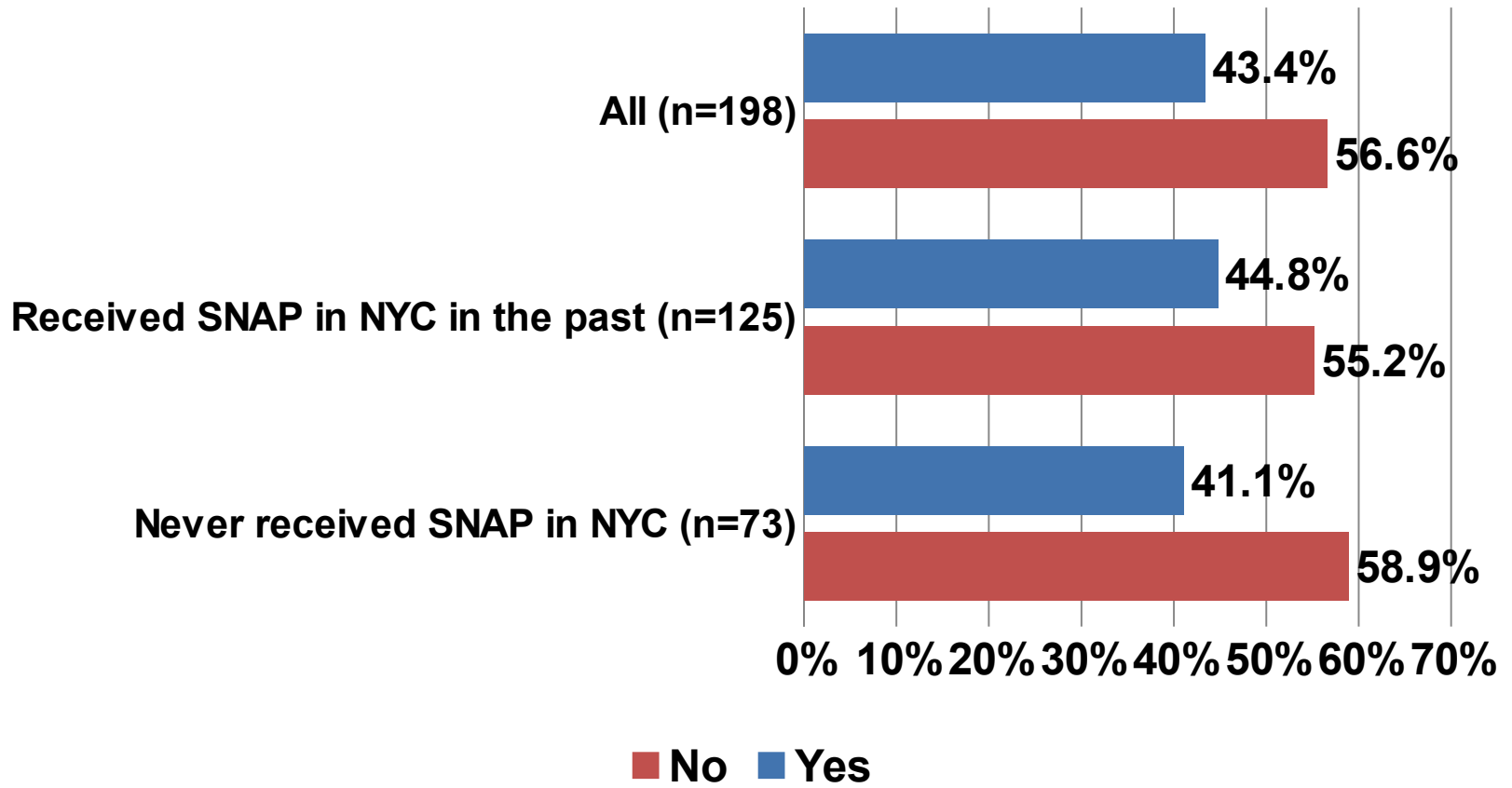
- I. Survey of SNAP applicants before implementation of self-service computers in HRA centers
- II. Survey of SNAP applicants who applied online at home (or at a computer that was not in the HRA center)
- III. Surveys and observations of clients who applied online at HRA center using piloted self-service computer banks
- IV. Comparison of surveys of in-center online applicants and online applicants submitting from home (or other location)

# I. Preliminary Data from Applicants Surveyed in SNAP Centers Before Self- Service Pilot Phase Began

# Key Findings from In-Center Applicant Surveys Before Self-Service Pilot Implementation

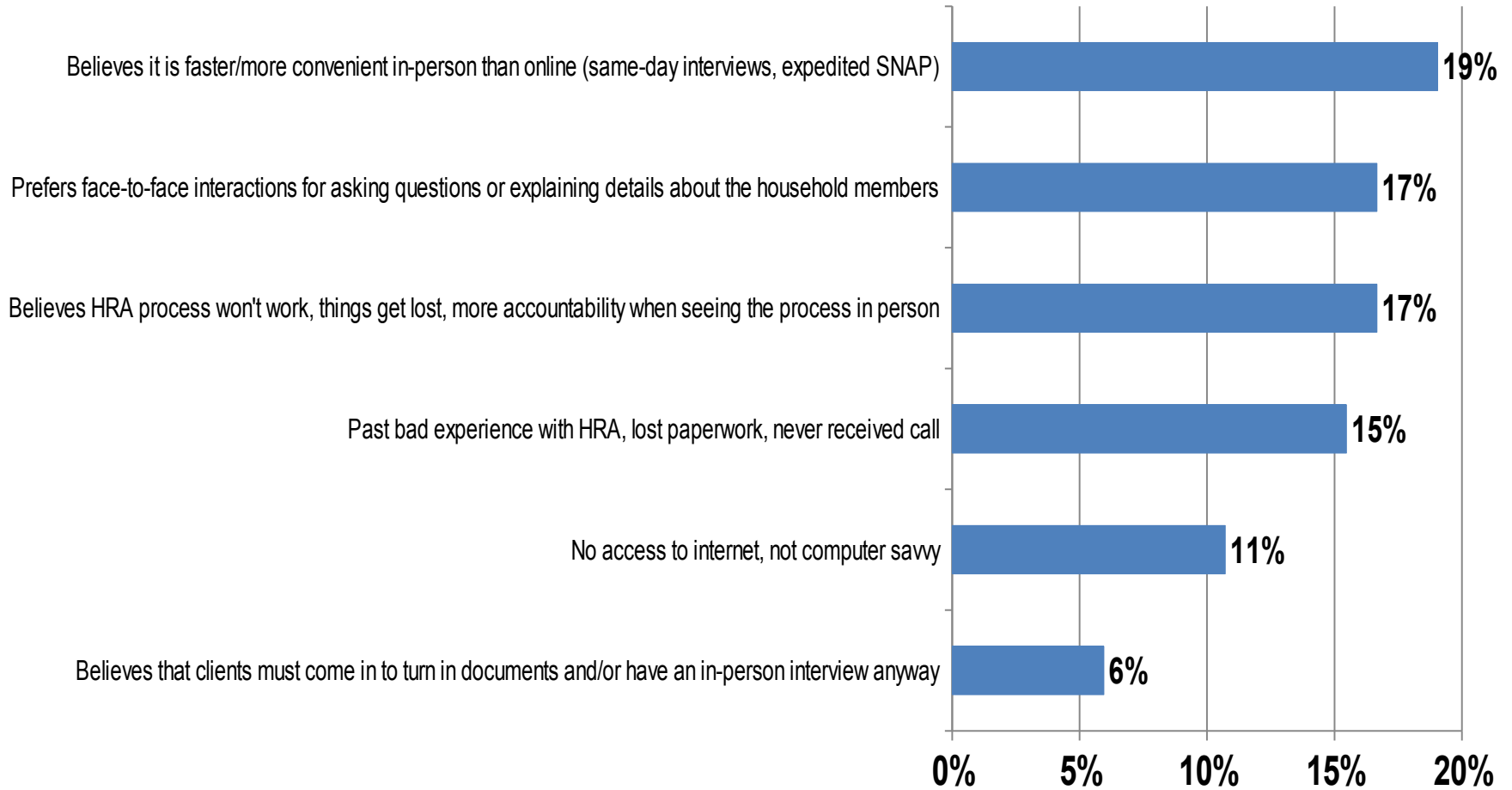
- Preliminary analysis before self-service implementation showed awareness of existing streamlined application processes was low – only 43% of in-center applicants had heard about the online option even though it had been available in NYC for more than two years.
- Of those that knew about online applications, the reason for applying in-center was most often that they believed the process would be faster (with a same day interview scheduled). Lack of computer/internet skills was cited only 11% of the time as a reason for not choosing to file online.
- Applicants working at least part-time were more than 50% more likely to want to apply using online app in the future than those not working.

# SNAP Applicants: Did you know before today you could apply for SNAP online?

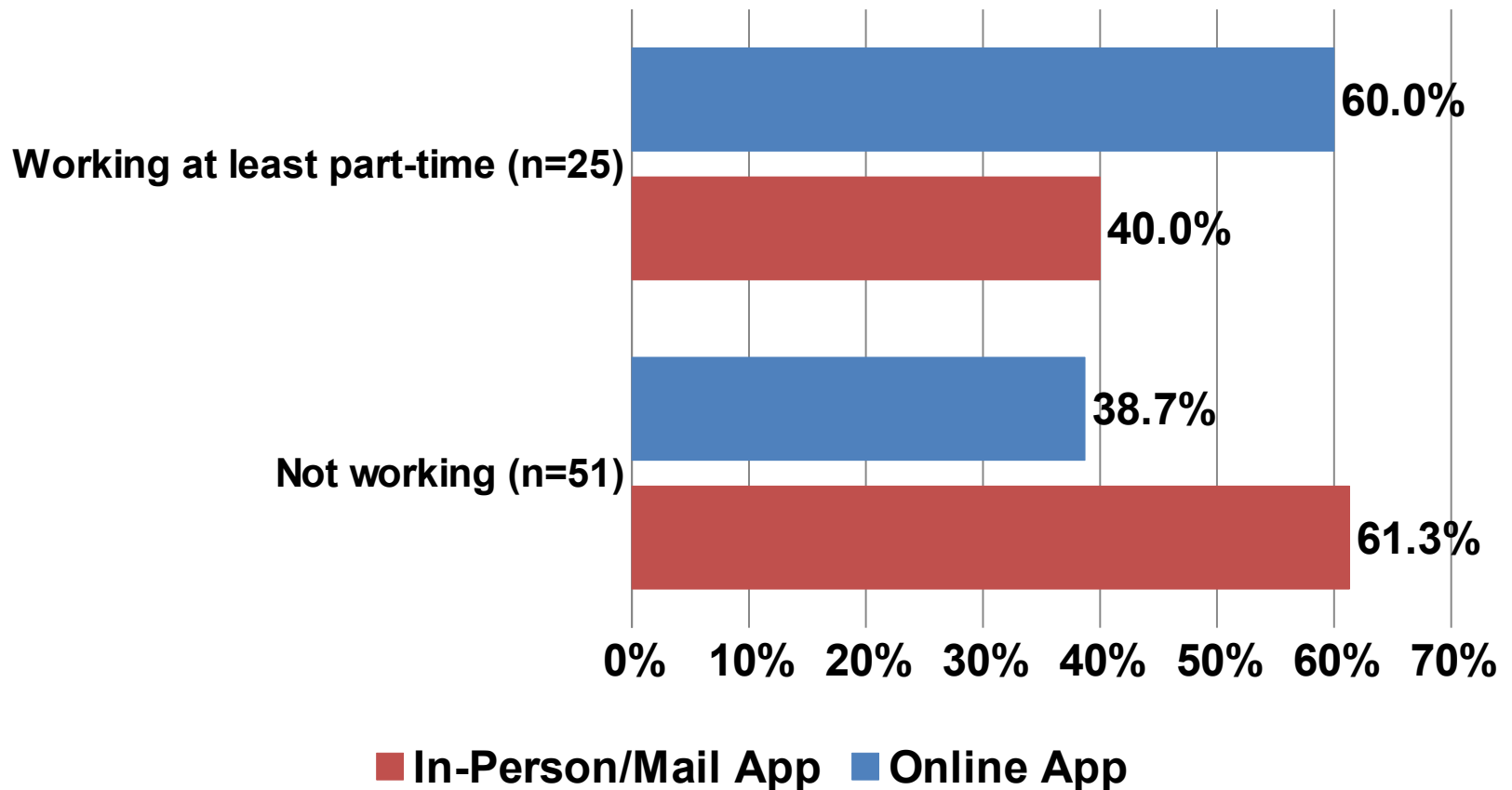




Of those who already **knew** about online (n=84), why did you apply in-person today?  
(free response, later analyzed and recoded into categories)



# If applying again in the near future, which would you prefer? (n=76)

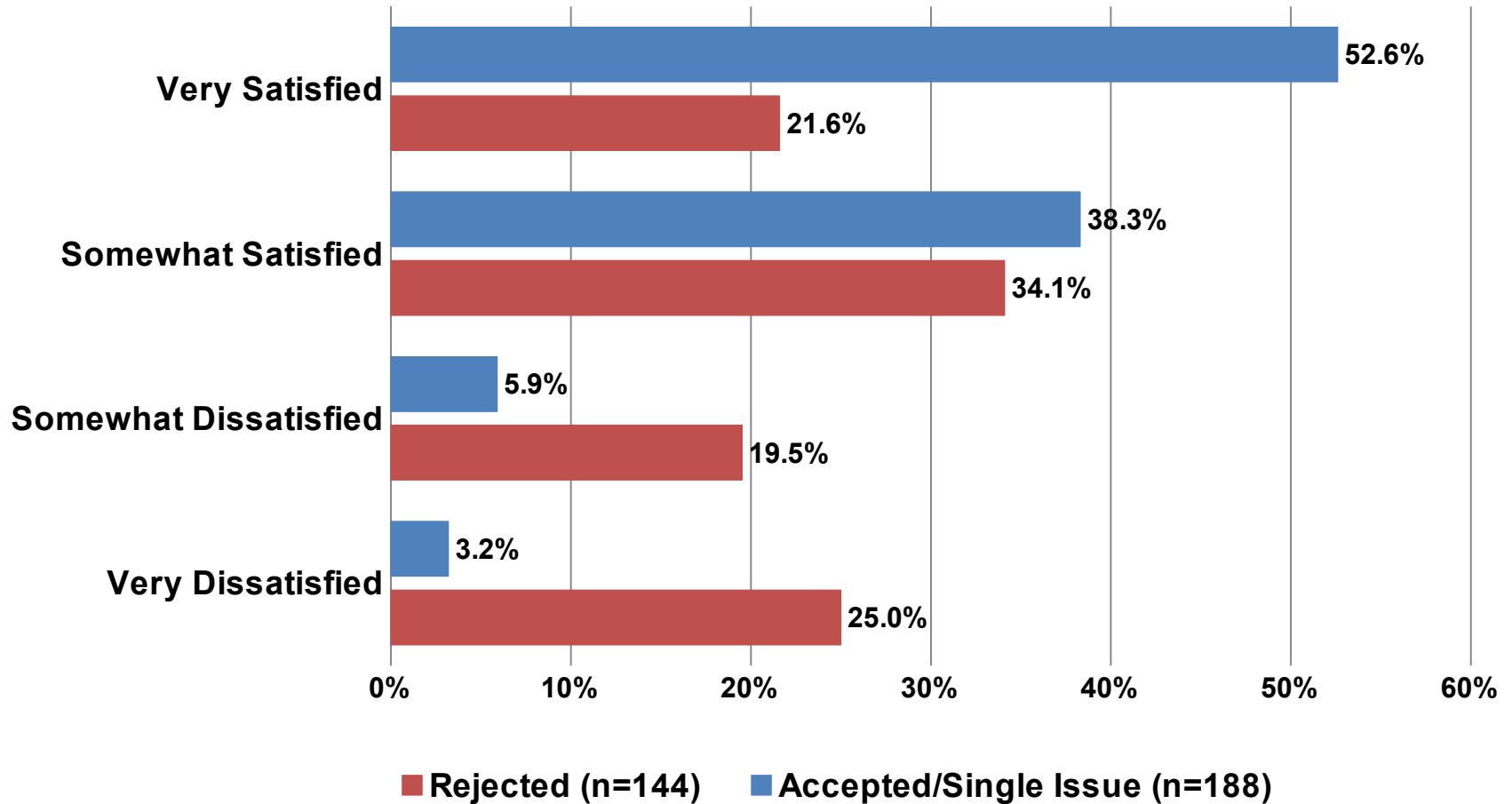


## II. SNAP Applicants Filing Online Application in March 2013 (not in the HRA centers)

## Key Findings from Online App Surveys (not in the HRA centers)

- Overall satisfaction with the online application was above 90% for those who had accepted SNAP cases. For those who had applications rejected (due to reasons other than excess income or citizenship reasons), satisfaction with the process exceeded 55%.
- 90% of accepted online applicants gave the online application a very/somewhat easy rating; 76% of rejected applicants rated the online application process as very/somewhat easy despite a lower overall satisfaction rate.
- For both accepted and rejected, the most common preference for future applications was an online application at a non-HRA location.
- Being rejected from SNAP during the online application process made individuals no more likely to want to apply using an in-center paper application than it did for accepted individuals. Instead, rejected online applicants were more likely than accepted individuals to prefer an online in-center application with help from HRA staff.

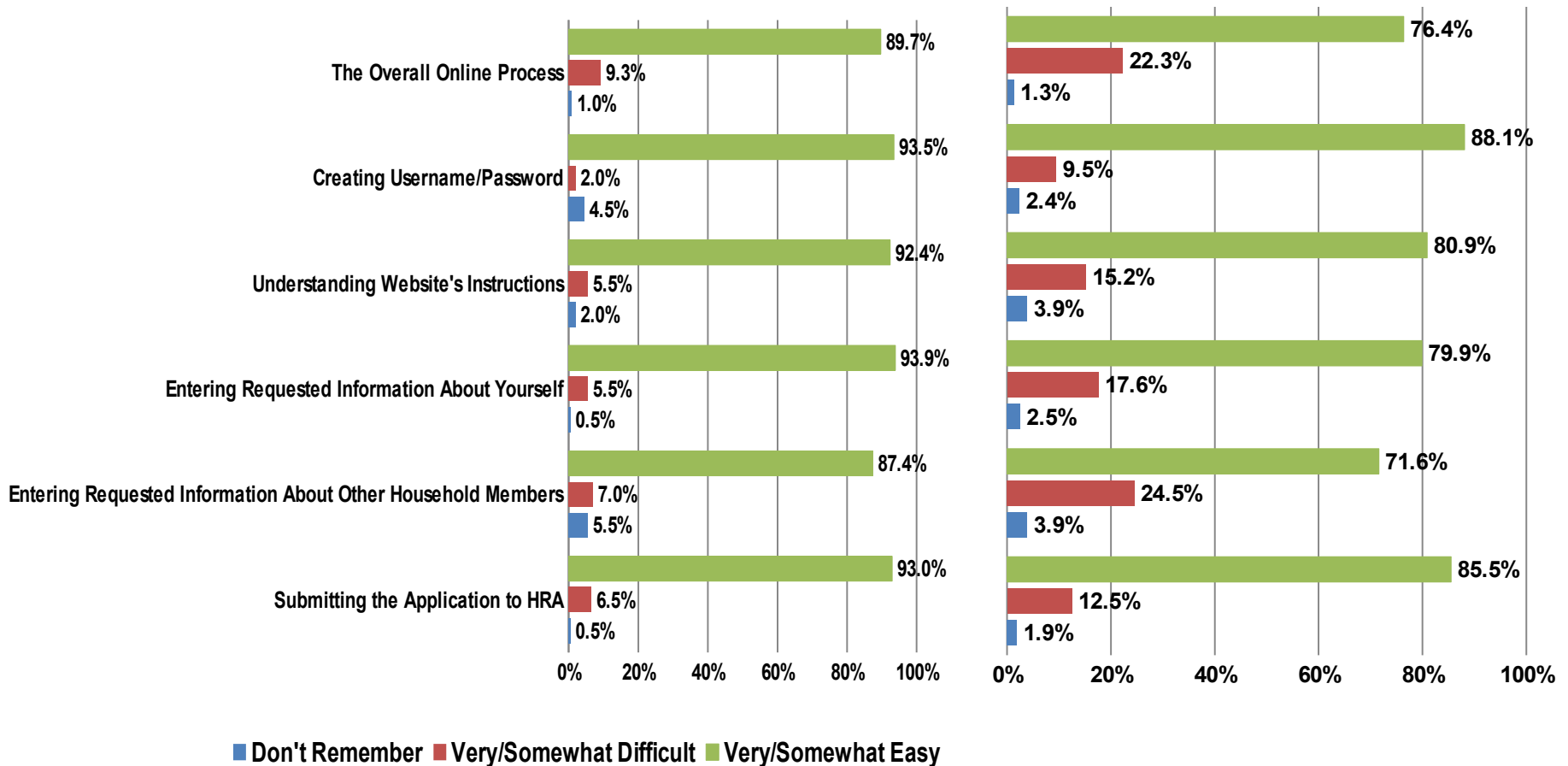
# Overall Satisfaction/Dissatisfaction with Online Application Process (n=332)



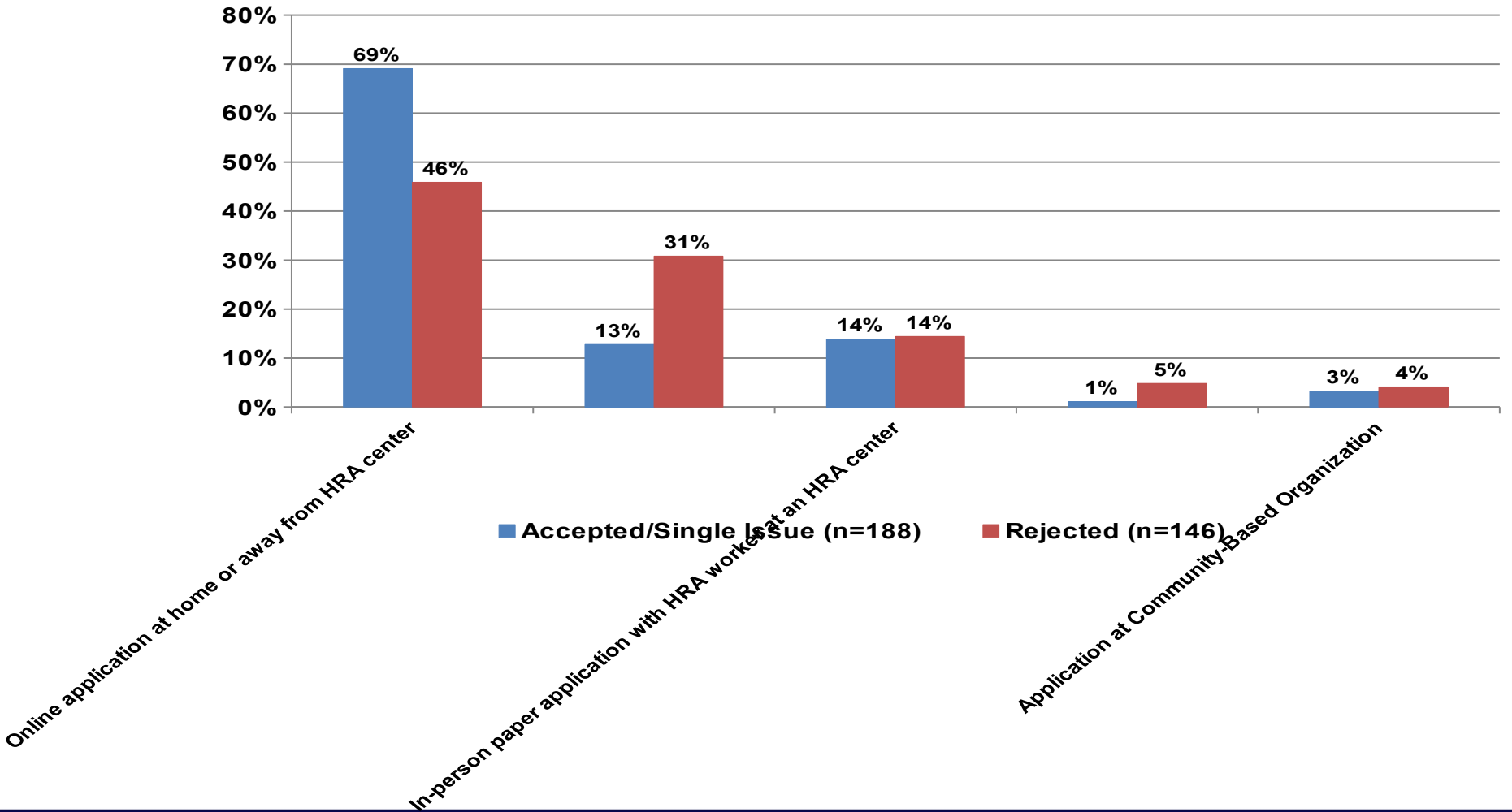
# How clients rated each of the online application process steps (n=358)

## Accepted/Single Issue (n=199)

## Rejected (n=159)



# If applying for SNAP again in the near future, which application method would you choose (n=334)?



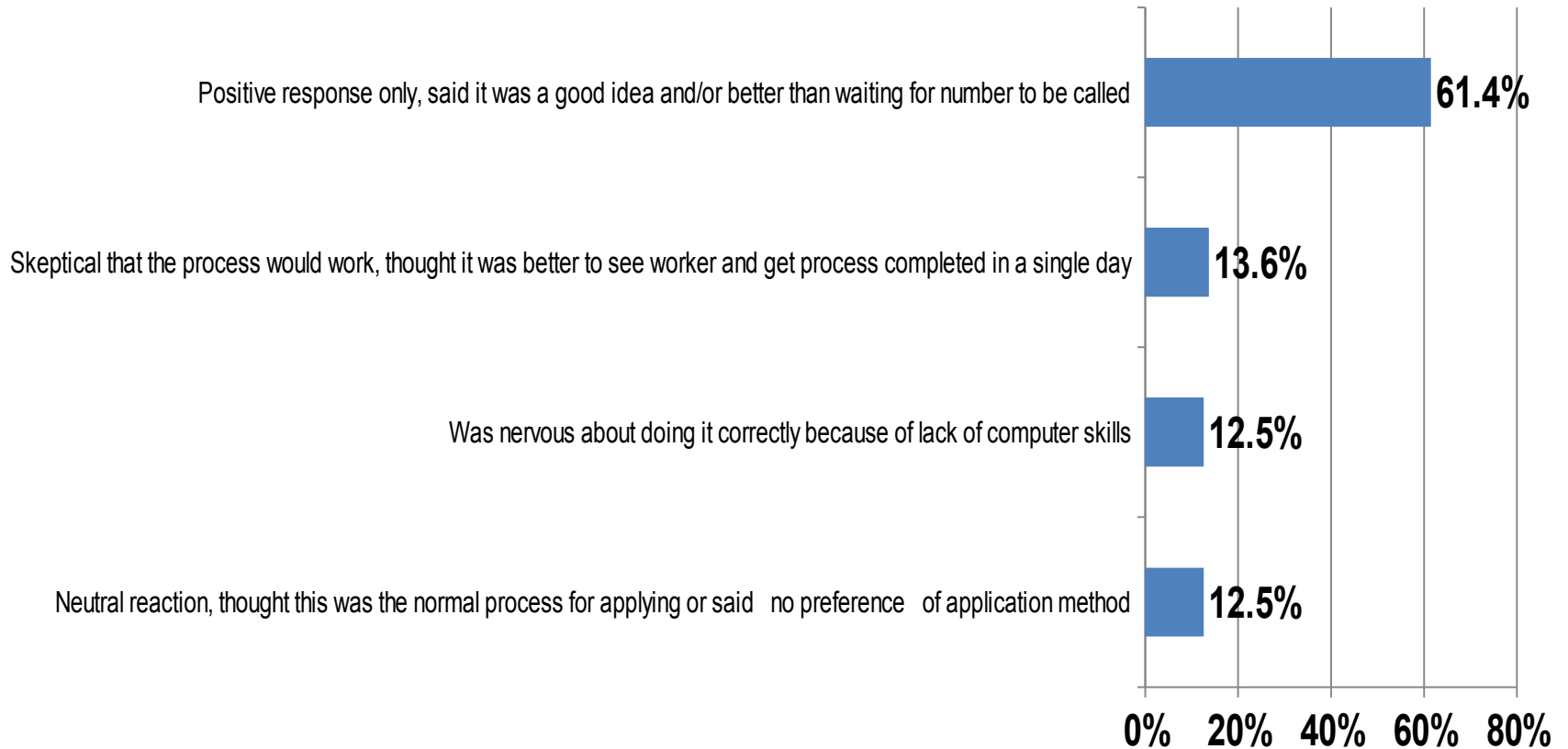
# III. Online Applicants Using Piloted Self-Service Computer Banks in the HRA Centers



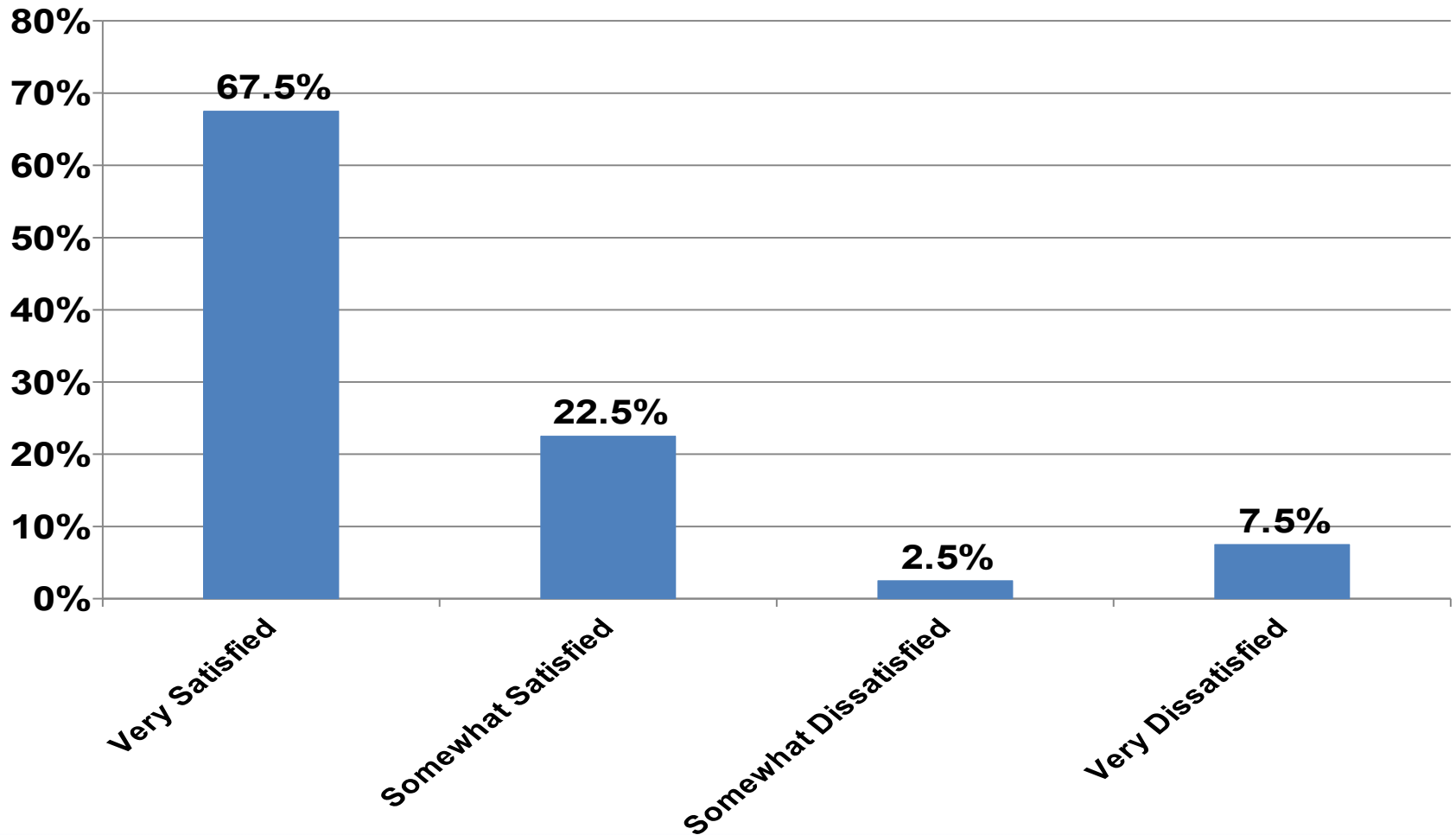
## Key Findings from In-Center Computer Application Pilot Sample

- Initially, 61% of respondents said they expected a positive experience before going through the online process.
- After completing and submitting the application with the assistance of HRA staff, 94% said they were “very” or “somewhat” satisfied with the process.
- Of those who did not initially respond positively, concerns included leaving the office without a same-day interview and possibly lacking computer skills to complete the application properly.
- While only 52% said after completing the online application that they felt they could have completed the application at home without HRA staff assistance, 92% said they felt they got the assistance that they needed from the staff.

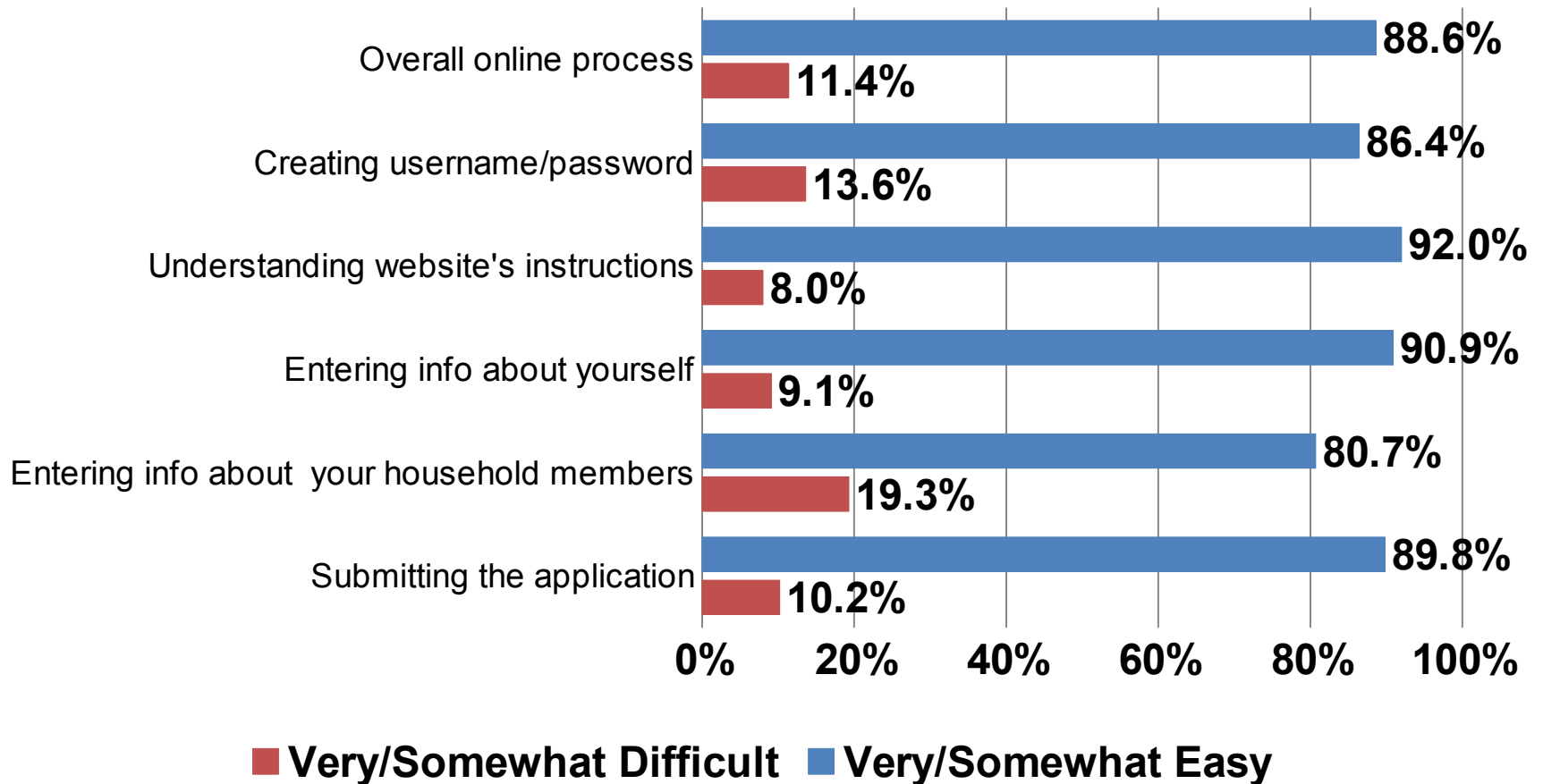
# What was your first reaction to finding out you could apply for SNAP online at the HRA center (free-response question, later analyzed and recoded) (n=88)?



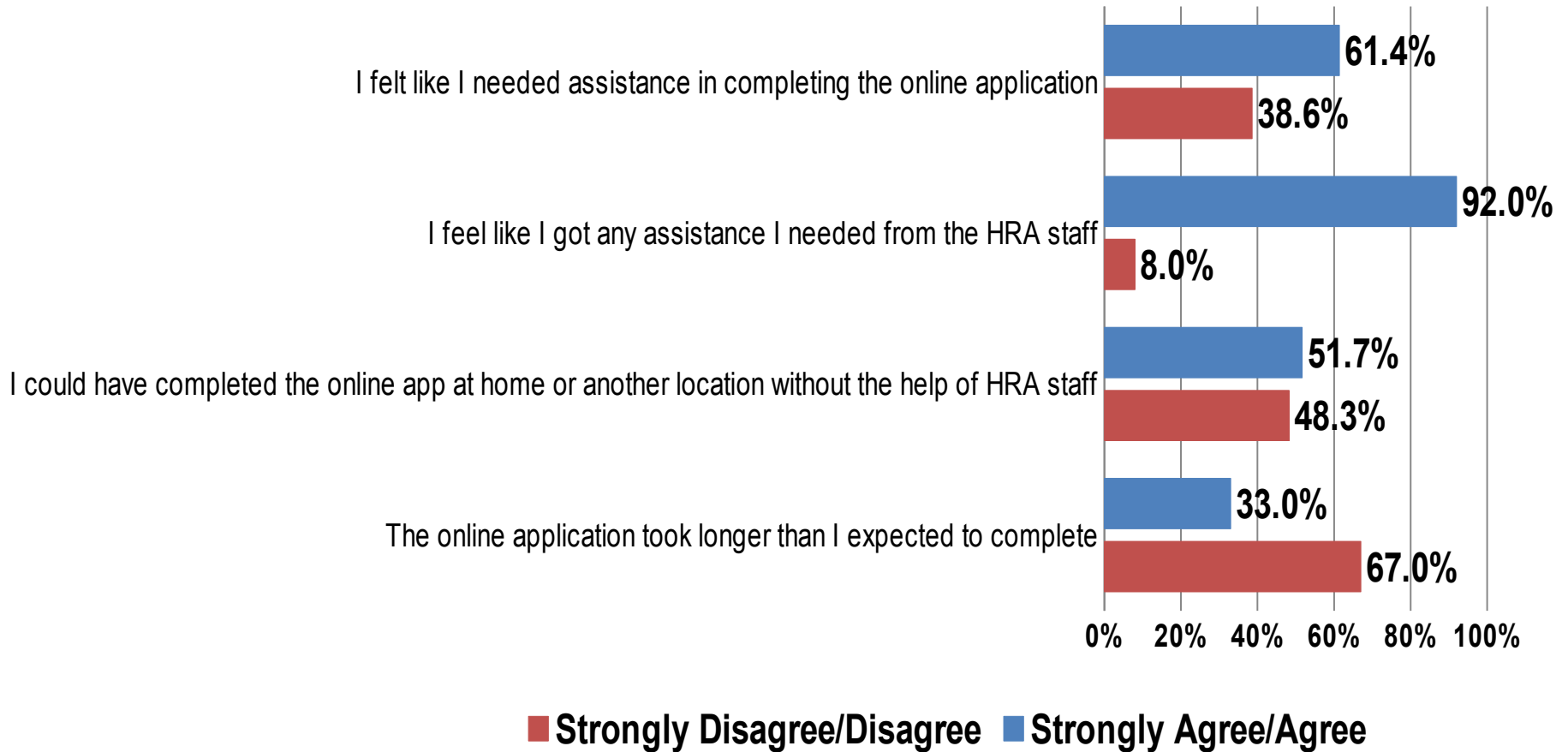
# After completing online application, how satisfied or dissatisfied are you with the process (n=88)?



# How easy or difficult was each of the following steps from the online application process (n=88)?



# To what extent to you agree or disagree with each statement about the online application process (n=88)?



# Summary of Findings from Client Experience Observations

# Challenges: Client-specific

- **Skills**

- Low literacy – clients asking that questions be read aloud to them by staff; not reported in client surveys due to possible stigma
- Lack of computer skills – not familiar with page navigation, not used to seeing that asterisks indicate required information, nervous about saving application info correctly (not wanting to submit incomplete info and be rejected)
- Ability to ask questions of staff in native language – usually Spanish-speakers who were able to navigate through Spanish-language application but sometimes got stuck and needed help from staff

- **Accommodations**

- Parents with young children often had difficulty entering info and addressing child's needs simultaneously

# Observed Client Attitudes Toward Overall Process

- Positive client feedback:
  - Convenience
  - Ease of use
  - Similarity to paper applications
  - Not having to wait in line
  - Privacy and control over own application
  - HRA staff assistance and attentiveness
  - Can be immediately screened for emergency benefits
- Ongoing client concerns:
  - Having to leave and wait on HRA to call for interview appointment
  - Not being able to get receipt or printed confirmation of application submission
  - Nervousness about using/understanding computers correctly
  - Nervousness about not receiving phone call from HRA after application submission



# Initial Recommendations from Research Staff Observing Self-Service Online Application Process

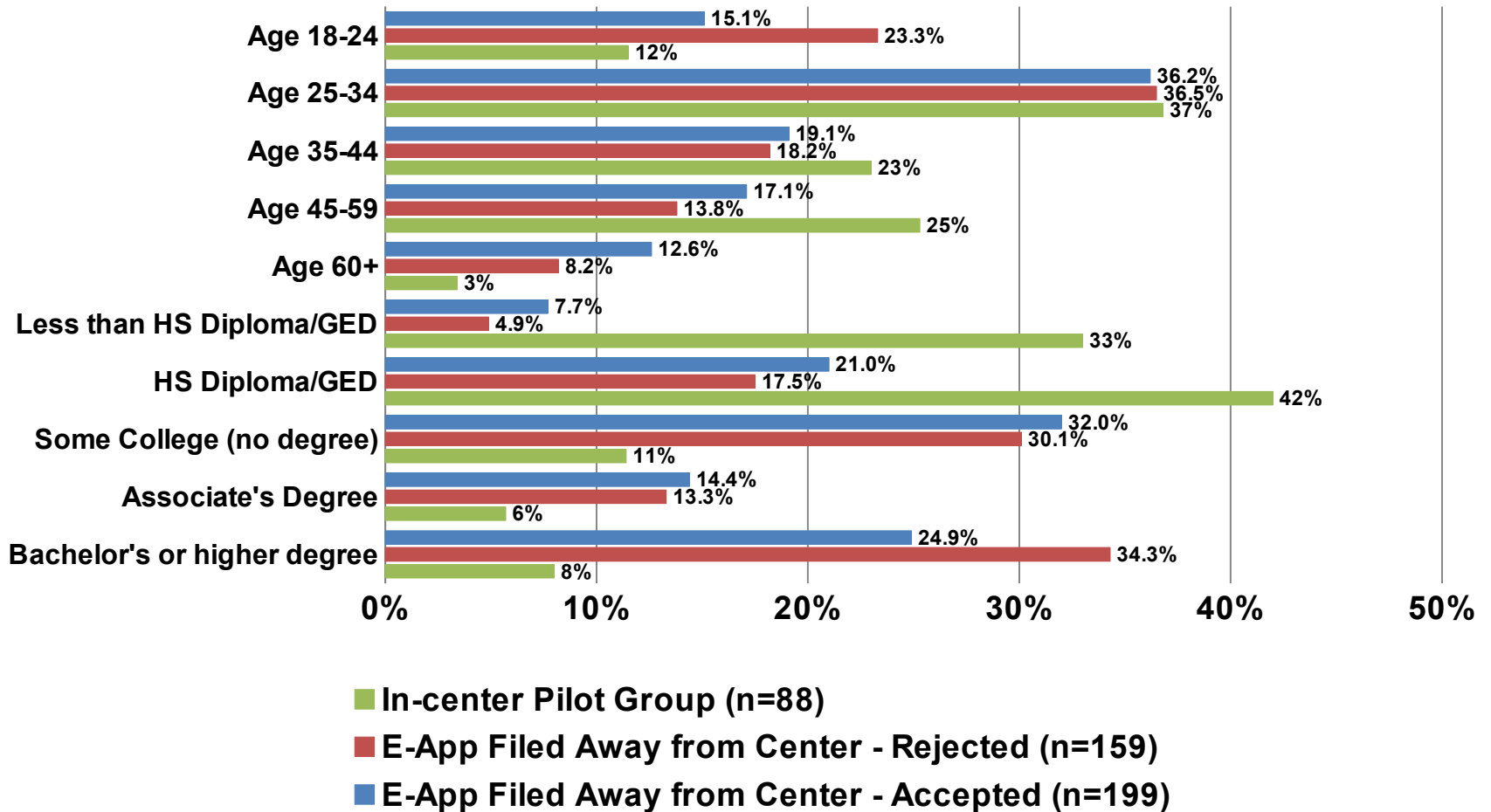
- Link User ID /password to cell phone text message (for re-set option)
- Remind clients of possible session time outs
- Add a “save” feature during application process (currently “save” is at the end)
- Clarify terms--provide definitions and more examples in the application (e.g., liquid assets, case head, residential address, immigrant sponsored worker)
- Provide proof in hard copy that the application was submitted/received by HRA (a printed receipt or confirmation)
- Provide more physical space for clients with accommodation needs

## IV. Comparison of In-Center Online Application Pilot Group to Online Applicants who Filed App at Home (or somewhere other than self-service computers in center)

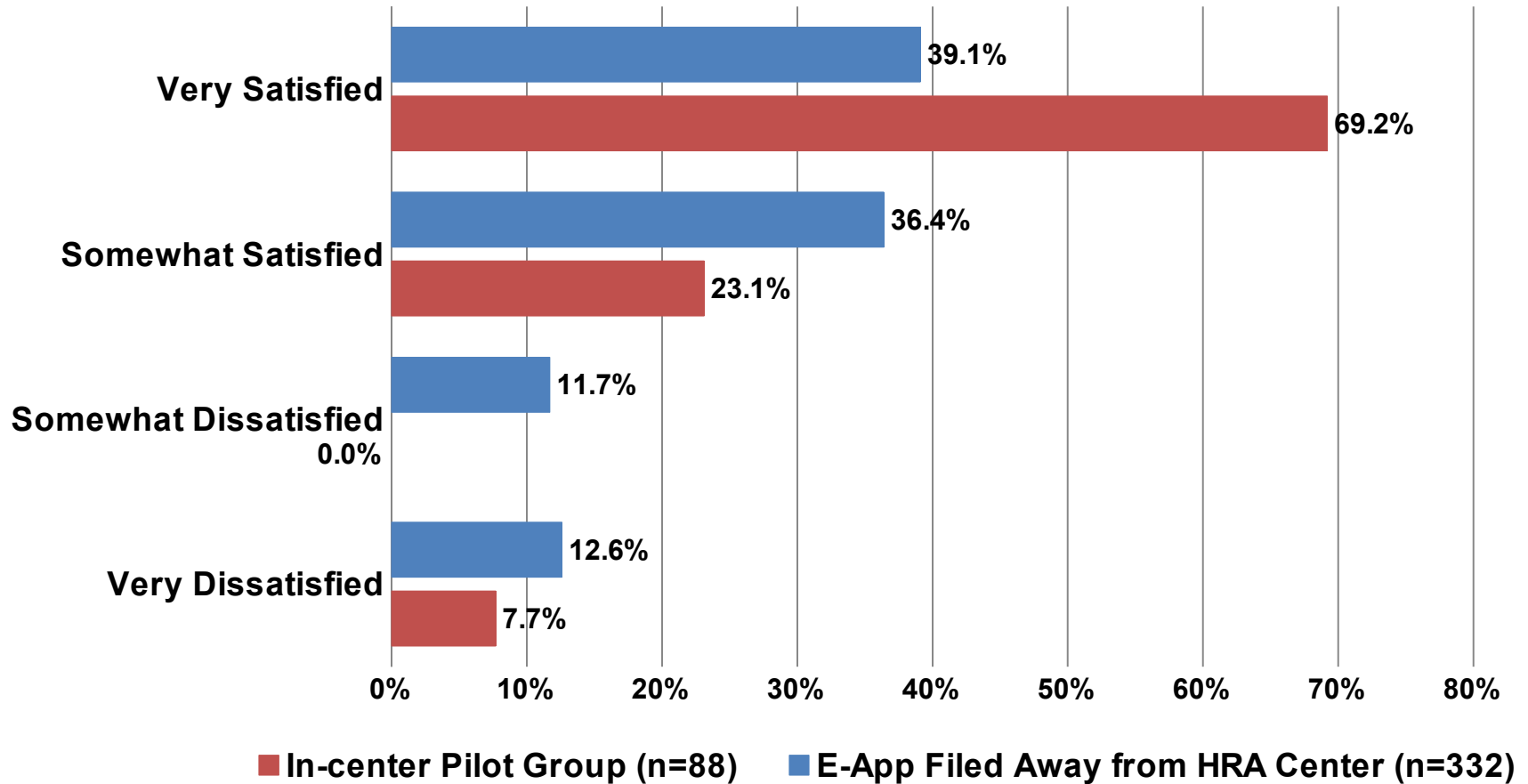
## Key Findings from Online Application Comparison (in-center v. not in-center)

- Compared to the in-center pilot group, individuals who filed online applications at home (or not in center), had a higher education level and were more likely to be younger than age 25.
- The in-center group expressed a greater overall satisfaction level with the online process, though they were surveyed immediately after filing and did not know the decision status of their application at the time.
- 59% of online applicants who applied at home said they would prefer that method in the future, while the in-center group was more divided on preferences.
- In-center respondents were most likely to want help from an HRA staff person if applying again (39%) and about equally as likely to want a paper/in-person application (31%) versus a home online application (30%).

# Comparison of Survey Sample Groups by Age and Educational Attainment (self-reported)

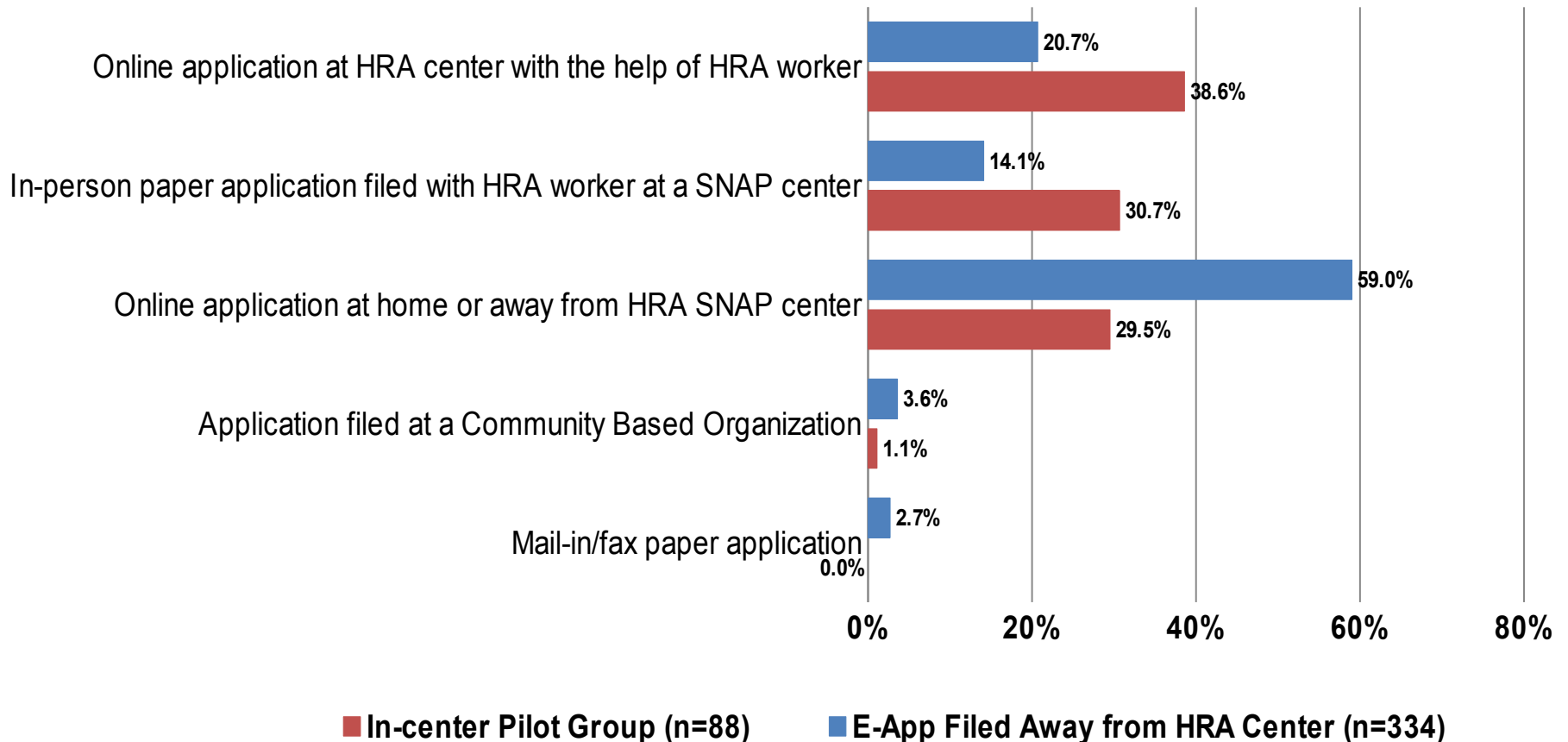


# Overall Satisfaction/Dissatisfaction with Online Application Process



*Note: In-center sample was surveyed before application decision was known to the applicant*

# If applying for SNAP again in the near future, which application method would you choose?



*Note: In-center sample was surveyed before application decision was known to the applicant*

# Conclusions

- Overall positive client feedback from self-service online applications at the HRA centers
- Survey responses and observations will help guide client-staff interactions and communications about the new self-service processes as they expand to centers citywide
- Applicants who wanted in-person paper applications were more likely to want same-day interviews, face-to-face interactions, and guidance through the process, rather than expressing lack of computer skills as their primary concern
- Receiving effective assistance on the application from HRA staff was a key client preference and was a satisfactory experience

# Further Research

- HRA has extended the online application process at computers in the HRA centers to 6 out of its 16 SNAP centers throughout the city.
- Ongoing client and staff surveys are focused on learning more about why after hearing about the availability of the online application, some clients prefer the old method of waiting in line to file a paper application where the information is collected and entered into the computer by an HRA worker.
- Current data research is also focused on comparing application outcomes before and after self-service computer application implementation (acceptance rate and rejection rate due to clients not following up with required processes).
- HRA is conducting survey research into the experience of using phone interviews and interactive voice response services that are available to some clients to better understand client preferences and level of satisfaction.