WELFARE PEER TECHNICAL ASSISTANCE NETWORK
Using Technology to Improve Administration of the TANF Program
Site Visit to Olympia, Washington
April 7-8, 2004

Final Report

The Michigan Family Independence Agency (FIA) is currently exploring ways to increase Food Assistance payment accuracy through integration and improvement of automated system support for field staff. Donald C. Mussen, Director of Income Support Programs for FIA, requested assistance from the Welfare Peer Technical Assistance (TA) Network. With their financial support, Michigan sent two representatives to participate in the USDA Food and Nutrition Service meeting, entitled "**Using Technology to Improve Administration of the Food Stamp Program**."

Mave Coxon, Manager, Cash Assistance & Employment Programs, and Joan Rouleau, Manager, Program Coordination & Support, participated in the April 7-8 meeting in Olympia, Washington, with representatives from USDA-FNS, Social Security Administration and 14 other states. The FNS Western Region and Washington State Department of Social and Health Services (DSHS) hosted the meeting.

The conference included both presentations and site visits to a Customer Service/Call Center and a Hub Imaging Center. Given that the conference was focused on technology, and that the use of that technology affects most of social services programs in one way or another, this conference is highly relevant to TANF programs. Examples of relevant topics include:

- A workshop on a document imaging system, which images all in-coming documents related to a case, and assigns those documents to a staff person for action.
- A session which highlighted that call centers may deal with change reporting, which could affect multiple programs.
- Information on the trial eligibility calculator and on-line CSO essentially allow families to go on-line, enter some preliminary data to find out if they might be eligible for assistance, then complete the application on-line if they wish to do so.

Day 1 – Presentations by States
The meeting provided overviews and demonstrations of innovative technology to improve customer access and administration of the Food Stamp Program including:

- Overviews of Call Center Technology from Washington, Nevada and Utah,
- Call Management Technology and Document Management System,
- Web-based technology for on-line application, data brokers
- Automated Food Stamps for SSI recipients
- Interactive Voice Response Systems for customers.

States providing presentations included:

Washington	Nevada
Utah	Virginia

Other states participating in the conference included:

Alaska	Illinois	Montana
Arizona	Iowa	Nebraska
California	Maine	New Jersey
Florida	Michigan	South Dakota
Idaho	Missouri	Vermont

Highlights of the Presentations

Call Center Technology

This is technology that supports clients calling a central telephone number with questions and change reports. Eligibility/case management staff answer the calls and process any changes required.

Washington, Utah and Nevada discussed call center technology in each of their states. All three have integrated eligibility determination, on-line manuals and electronic case files. The call center models also include integrated voice response (IVR) systems as well as centralized customer service representatives.

This technology offers a great opportunity. If designed properly, clients can get to the right person faster and get served faster. It can reduce client traffic and allow local offices to focus on value added client services. It capitalizes on technology to let workers do more value added services in less time.

WASHCAP (Washington State Combined Application Program)

This is a centralized stand alone Medical Call Center. Six financial workers handle about 32,000 SSI and FS cases. This is part of a demonstration project that Michigan hopes to join during the next window of opportunity. SSA accepts a simplified application for qualified SSI recipients and automatic Food Assistance is opened and authorized by the same SDX process that activates Medicaid.

Benefits:
- Specialized program knowledge allows staff to answer most questions.
- Toll free number is statewide.
- Reduction of client contact and workload for field offices.
- Helpful for a less mobile population.

Washington was the first state to automate the full process.

They are saving about 55,000 hours per year that Local Offices would have spent doing applications and re-certifications. It paid for itself in 17months.

It's better for clients. 99% of the cases are accurate. Clients don't have to visit the state office or complete a separate Food Stamp application. All changes are completed via phone or mail. Clients have a longer certification period. In addition, Social Security Administration's SSI re-determination re-authorizes Food Stamps.

Washington DSHS - Document Management System

The Document Management System (DMS) uses high volume codex scanners to image incoming documents. Each scanned document is indexed to the household and client. This attaches the document to an Electronic Case Record (ECR) or creates one. An electronic assignment is sent to the worker of record.

Washington moved to this technology to mitigate staff losses and budget cuts by redirecting staff resources from creating and managing files. DMS also eliminates lost documents.

This system created organizational freedom. It provided the ability to create new service delivery models. Any worker in the state has access to all electronic case records in the state and can process cases from any location in the state.

Telephone Records and Case Information Tracking (TRAC-IT)

TRAC-IT is a shared workload system. Using Call Centers means that the workload is driven by the calls that come in, not by who owns the caseload. This caused a significant workload paradigm shift. . TRAC-IT is flexible enough to support different work management structures.

TRAC-IT is a workload portal to all other applications. Through TRAC-IT, workers can perform inquires, authorize benefits, complete eligibility determinations, document case actions, view the electronic case record.

TRAC-IT and DMS interact. <u>Everyone</u> uses it, even those not on phones. It is now a record of all pending case actions, changes - any information that gets to the department.

Utah's *e*Find

Utah developed eFind in response to Food Stamp payment accuracy sanctions. eFind replaced multiple searches in multiple systems with a single web application that provides eligibility workers with filtered, organized information from many different federal, state and local sources.

The *e*Find's primary targets were to:

1. reduce failure to act errors by eliminating the need to access multiple, cumbersome data sources and
2. eliminate the need to reconcile information from various sources. Everyone becomes an expert.

It is possible to add data sources without increasing errors.

Web Development in Washington

Washington is moving forward with web development to increase access for both clients and staff. They are moving their Automated Client Eligibility System (ACES) functions from a mainframe to the web and developing an integrated architecture.

Why web?
Web technology makes it easier to change systems. It provides a way for systems to talk to other systems with live interfaces.

Day 2 – Site Visit
On the second day of the conference, we were able to tour the Olympia Community Services Office and observe the following applications/systems in use:

- The DMS HUB Imaging Unit
- The Call Center
- Demonstration of application processing, including ACES and TRAC-IT

Lessons Learned

1. States need to have a strategic plan for technology.
2. Plans need to have realistic scope for individual phases and commitment to complete all phases. Unfinished technology can add work without adding value or support for staff.
3. More technology isn't necessarily better. For instance, adding data access and matches without an organized method to display results to workers can increase failure to act errors.
4. One technology or model alone does not necessarily add value or get the complete job done. For example, successful call centers use IVR and call staff. States also found that successful call centers require electronic case records.
5. From the user's perspective, multiple systems, platforms and applications are not the problem. Multiple log-ins, duplicate data entry and separate processes for individual programs are the problem. For example, Washington has multiple systems, different platforms and many technologies, but TRAC-IT ties them all together for their workers.
6. Some states were able to identify cost savings from their technology projects.
    - Washington's cost-benefit analysis of document imaging/electronic case record shows savings of $50 million per life cycle (10 years.)
    - WASHCAP (automated Food Stamp opening with SSI) paid for itself in 17 months.

- Utah has calculated that **eFind** will save $2.1 million in staff time per year and pay for itself in the first year.

Cost savings from the other initiatives were not discussed but would need to be offset against the cost of the technology hardware, development and maintenance.