KEEPING OHIOANS CONNECTED

May 2023

State: State of Ohio

Agency: Department of Administrative Services, Department of Job and Family Services, Department of Medicaid

Award Category: Emerging & Innovative Technologies

Project Title: Keeping Ohioans Connected

Project Dates: Phase 1 (SNAP/TANF) May 2022 – January 2023 | Phase 2 (Medicaid Unwinding Kickoff) – May 2023

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Supplemental Material:

Keeping Ohioans Connected Video: https://vimeo.com/808431338
(*password: accentureohiobenefits2022v2*)

Executive Summary – Keeping Ohioans Connected

To better serve the needs of millions of Ohioans who rely on state assistance programs including Supplemental Nutrition Assistance Program (SNAP), Cash Assistance, and Medicaid, Ohio implemented the **Keeping Ohioans Connected** project within the Ohio Benefits Program**.** This effort is powered by Proactive Communications, and it supports applicants through personalized benefits journeys. It reaches up to 25% of the state's 11.7 million residents through more than 25 million interactions a year across conversational text messages and automated voice conversations. By connecting with Ohioans at key moments that matter in their benefits journeys, this project helps them secure and maintain uninterrupted access to needed benefits.

The Ohio Benefits Program used Human Centered Design (HCD) analysis to evaluate caseworker and resident experiences with the objective to reduce program fallout for those still in need of benefits, to increase the adoption of digital technologies, and to generate awareness of Pandemic Health Emergency (PHE) Unwinding to streamline recertification of critical benefits. A key output of this analysis was the identification of the opportunity to use Proactive Communications, powered by conversational artificial intelligence, to augment existing self-service capabilities in the Ohio Benefits Self-Service Portal (SSP). Phase 1 was rolled out for SNAP and Cash Assistance starting in late 2022, and Phase 2 provides expansion to support Medicaid, which kicked off in May 2023 and will be rolled out statewide in June.

This forward-thinking vision is rooted in a data-driven, digital-first approach to meet Ohioans in their channel of choice. **Keeping Ohioans Connected** directly aligns with NASCIO's State CIO Top Ten Priorities for 2023 -- Digital Services (priority #2) and Cloud Services (priority #6).
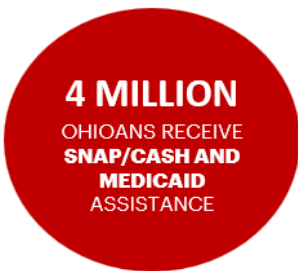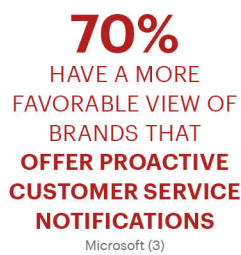
The Opportunity

Ohio, like many states, faces significant challenges in successfully serving the needs of SNAP, Cash Assistance, and Medicaid beneficiaries, with many recipients unknowingly losing benefits due to a lack of awareness of re-enrollment deadlines and/or other program compliance requirements. The unanticipated loss of benefits was beginning to create undue stress on Ohioans and caseworkers alike, especially with the additional pressures due to the recent PHE Unwinding. As many eligible recipients were headed toward disenrollment, the state realized that recertifying and reinstating these individuals was going to create significant challenges, including surges in caseloads, capacity to communicate, and unnecessary returned mail. Ahead of this, the state took action to drive improved servicing by standing up **Keeping Ohioans Connected**.

Why Does it Matter?

Ohio Benefits Program leadership is passionate about implementing solutions to ensure that Ohioans are aware, educated, and enabled to receive continued assistance benefits, while also reducing pressure on state systems and workers. With additional stresses to the system from PHE Unwinding on the way, there is increased importance placed on digital capabilities to reduce unnecessary churn, improve timeliness, and maximize self-service.

4 MILLION OHIOANS RECEIVE **SNAP/CASH AND MEDICAID** ASSISTANCE

1 IN 5 APPLICATIONS HAVE A **PENDING VERIFICATION** AT ANY GIVEN POINT

25,000 OUT OF **55,000 SNAP PROGRAMS** PER MONTH **FAIL TO COMPLY** WITH RE-CERTIFICATION REQS

400,000 INCREMENTAL CASES IN **MEDICAID RENEWAL BACKLOG** DUE TO PHE UNWINDING

Proactive Communications both improve service and reduce operational expenditures. They achieve this through improvements in churn, digital adoption, timeliness, latency, engagement, compliance, and resident satisfaction.

87% OF CUSTOMERS WANT TO BE **PROACTIVELY REACHED OUT TO** BY A COMPANY FOR CUSTOMER SERVICE RELATED ISSUES
MyCustomer (1)

90% OF CUSTOMERS RATE **IMMEDIATE RESPONSES AS IMPORTANT** OR HIGHER WHEN THEY HAVE A QUESTION.
Hubspot (2)

70% HAVE A MORE FAVORABLE VIEW OF BRANDS THAT **OFFER PROACTIVE CUSTOMER SERVICE NOTIFICATIONS**
Microsoft (3)

OVER A 12-MONTH PERIOD, PROACTIVE CUSTOMER SERVICE CAN LEAD TO A **20-30% REDUCTION** IN CALL CENTER CALLS — **LOWERING CALL CENTER OPERATING COSTS BY AS MUCH AS 25%**
MyCustomer (1)

What Makes it Different?

Our Proactive Communications solution represents a significant step forward in resident engagement and service delivery. Through our conversational AI platform, the Ohio Benefits Program can advance resident outreach capabilities from one-way, manually triggered, fire and forget, outbound-only messaging to personalized, two-way conversations that proactively engage with Ohioans at the right time in their application lifecycle.

This capability meets residents in a way that is convenient and accessible to them – with personalized conversations, delivered with proactive engagement, through a cloud-based conversational AI.

Personalized Conversations

Highly personalized and data-driven, allowing us to target specific individuals with conversations that are tailored to their needs and situation, increasing the likelihood to be received positively by the recipient.

Conversational AI

Leveraging conversational AI technology to understand natural language, the two-way conversations create a more human-like interaction that is constantly refined by a human AI trainer, helping keep support contained to self-service.

Proactive Engagement

Automated conversations, reaching individuals before they even realize they need assistance, reducing the burden on staff and resources, while improving the support for the individual.

Cloud-based

Leveraging cloud-native capabilities from the conversational AI platform and a light-touch integration with the integrated eligibility system makes the platform scalable, flexible, secure, and quick to implement.
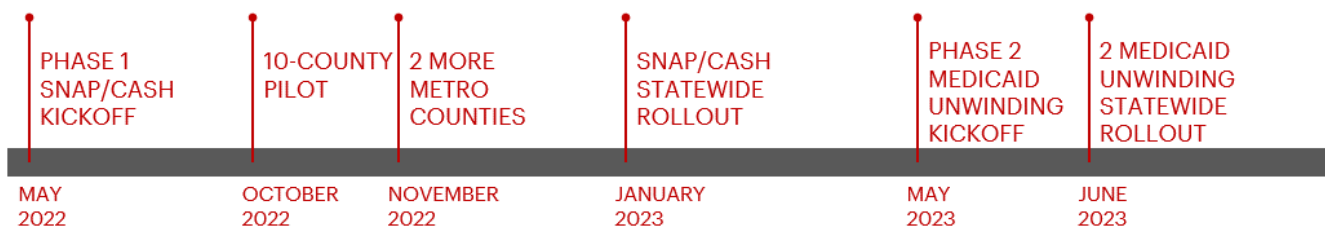
What Makes it Universal?

Improving resident experiences and outcomes are common objectives in public service. The Ohio Benefits Program is proud of the results already achieved in the state. The team has shared the solution in cross-state forums and directly with other states who are also exploring or implementing this capability, including with Arizona, California, North Carolina, Tennessee, and Washington. Additionally, Ohio Benefits Program shared the solution with multiple USDA Food and Nutrition Service regional offices.

IMPLEMENTATION
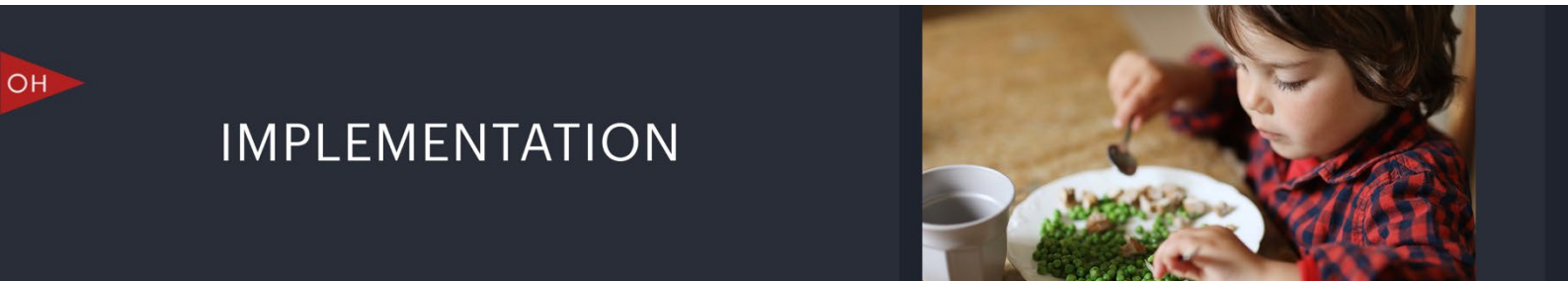
What Was the Roadmap?

Our solution roadmap was split into two phases: **Phase 1** focused on delivering an end-to-end journey for SNAP and Cash Assistance benefits, and **Phase 2** focused on delivering a Medicaid Unwinding journey to assist people through their renewal journey after they fall out of the automated Medicaid renewal process.

PHASE 1 SNAP/CASH KICKOFF	10-COUNTY PILOT	2 MORE METRO COUNTIES	SNAP/CASH STATEWIDE ROLLOUT	PHASE 2 MEDICAID UNWINDING KICKOFF	2 MEDICAID UNWINDING STATEWIDE ROLLOUT
MAY 2022	OCTOBER 2022	NOVEMBER 2022	JANUARY 2023	MAY 2023	JUNE 2023

Our roadmap continues to present various **POSSIBILITIES FOR EXPANSION**, both for Medicaid and beyond, that are on the horizon.

Who Was Involved?

Our Proactive Communications implementation was truly collaborative, bringing together three state agencies: the Department of Administrative Services (DAS), the Department of Job and Family Services (ODJFS), and the Department of Medicaid (ODM). The Ohio Benefits Program leadership team provided the executive vision and sponsorship, and the implementation was supported by business analysts, project managers, policy experts, communications leaders, and technologists across all three agencies. Our robust change management and communication plans ensured stakeholder buy-in at all levels and field readiness for 8,000+ caseworkers across 88 counties.

How Did We Do It?

Our solution builds on three key components – identified moments that matter, using conversational AI capabilities provided by a proven platform, integrated with existing program components through real-time APIs.

1 **MOMENTS THAT MATTER**

Using a data-led approach to identify various moments that matter within the SNAP, Cash and Medicaid application lifecycle. These moments often led to delays in or loss of benefits for Ohioans. Using a Human Centered approach to our conversation design, we thoughtfully designed personalized interactions.

2 **CONVERSATIONAL AI PLATFORM**

Underpinned by the new/emerging cloud technologies, we adopted a packaged platform solution that allowed us to hit the ground running fast, with pre-built components that drive journey orchestration, enable two-way asynchronous communication leveraging conversation AI, and engage using multi-channel through channels of preference.

3 **REAL-TIME API**

Complemented through leading cloud practices and frameworks, ISO security compliance, and privacy considerations, we powered the capability through integration with the existing Ohio Benefits systems that served the relevant source data for real-time, personalized interactions.

WHAT WE DELIVERED

SNAP and Cash Journey
including application intake, interim reporting and recertification
- ✓ 11 conversations
- ✓ 13 AI intents
- ✓ 3 personas
- ✓ 3 modes of communication (SMS text, Voice/Voicemail, Email)

Medicaid Unwinding Journey
including mailing address updates and renewal
- ✓ 4 conversations
- ✓ 13 AI intents
- ✓ 1 new microsite
- ✓ 3 modes of communication (SMS text, Voice/Voicemail, Email)

OH

IMPACT

What Did the Project Make Better?

The solution improves resident satisfaction by creating a **frictionless, personalized experience** via channels like SMS text and automated voice calls and driving **increased adoption** of pre-existing self-service capabilities.

BEFORE

- ✗ Individuals were restricted to traditional call centers and their business office hours for getting responses to their questions.

- ✗ They were constrained to paper mail to receive information from the state.

- ✗ They were served via one-way, fire and forget SMS blast messages and voice calls that would take days and weeks to send to the intended populations.

AFTER

- ✓ Individuals are educated, informed, and supported for program requirements with a multi-channel approach in real-time.

- ✓ Their needs are catered to through data-driven triggers, orchestrating communications to their unique situation and journey.

- ✓ They are heard, through Natural Language Processing technology with active 'always on' listeners responding back in real-time.

- ✓ And they are served, through scalable cloud infrastructure that adapts to ever changing constituents' demands for benefits, and can communicate to full populations within hours, making latency relatively obsolete.

Overall, agencies can rest assured that they are staying connected with Ohioans while enabling caseworkers to spend more time on higher value activities. Our customers feel better cared for, and they are served with less churn and improved timeliness.

How Do We Know?

The Ohio Benefits Program was able to measure the success of the project in several ways. The adoption results and customer feedback are extremely positive to date.

- 88 of 88 Ohio counties were activated on the Proactive Communications platform
- 740,000+ Journeys initiated since Go Live
- 1,700,000+ SMS text or automated voice calls sent to Ohioans
- 67% containment rate for the conversational AI engine (matched intents / total utterances)
- 2X+ digital adoption for interim reporting submission
- <2% opt-out from contacted individuals

Our customers are impressed too, and they are letting us know:

> **THANK U SO MUCH.** I HAVE BEEN PRAYING AND LOOKING FOR MY MAIL DAILY. THIS IS GREAT NEWS [TO RECEIVE PROACTIVE COMMUNICATIONS]. THANK U AGAIN.

> **I LOVE THIS** WAY OF COMMUNICATING AND IT IS **VERY HELPFUL.**

> I RECEIVE EMAIL AND [PROACTIVE] TEXT TO GET COMMUNICATION... AND THEY ARE **VERY THOROUGH.**

> **SUPER EASY,** WISH I WOULD HAVE CHOSEN THIS METHOD [SMS TEXT CONVERSATIONS] SOONER.

> IT [PROACTIVE COMMUNICATIONS] REMINDS ME TO DO THE PAPERWORK AND TELLS ME WHEN TO COMPLETE IT; LETS ME KNOW ITS' BEEN RECEIVED; **IT'S SECURE, CONVENIENT AND SIMPLE.**

> THE PHONE ONLINE AND [PROACTIVE] TEXTING IS **VERY EASY TO UNDERSTAND** AND **VERY CONVENIENT.**

What Now?

Oho Benefits continues to monitor the success of Proactive Communications through ongoing reporting and analytics. As the solution expanded from counties to statewide, the team identified utterance tuning that would improve containment rates. This diligence helps ensure that Ohio Benefits is not only achieving high customer satisfaction, but also achieving the target business outcomes of reducing avoidable gaps in benefits, improving timeliness, and reducing unnecessary churn.

Through Proactive Communications, the team is addressing the ever-evolving needs of its workers and Ohioans. Whether we are supporting our customers with benefits or adopting new ways of living and working, we always put them at the heart of everything we do - **Keeping Ohioans Connected**.

Sources:

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