Consent-Based Verification Pilot C for Medicaid Data and Insights

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Executive Summary

Pilot C for Medicaid was a milestone pilot because it was the first consent-based income verification project with a state Medicaid (i.e. not SNAP) partner agency. It also introduced the highest number of beneficiaries to The Centers for Medicare and Medicaid Services (CMS)'s Income Verification-as-a-Service (IVaaS) platform to date.

Over the course of 6 weeks, IVaaS's consent-based verification tool helped 894 Medicaid clients submit proof of their income during this pilot - primarily from mobile devices. Searching and logging in presented challenges for clients, especially individuals who were unemployed, but 54.8% of the sessions that attempted log in were ultimately successful. Among client sessions that successfully logged in 78% submitted an Income Report back to the agency.

A survey of 139 caseworkers showed that caseworkers found it easy and fast to use IVaaS's income reports (Income Reports), and state staff who indexed the reports to the correct case found it to be easier than paystubs.

The pilot also demonstrated weaknesses inherent to using a generic link rather than a unique or tokenized link to IVaaS's consent-based verification tool. A generic link required Medicaid clients to enter their date of birth and the option to also enter their case number. This data entry presented another drop-off point. It also meant the product data could not disambiguate multiple sessions in a single household from discrete sessions across multiple households. Generic links also imposed a greater burden on caseworkers to index reports to the correct Medicaid case. Future pilots should use tokenized links to improve completion, provide better data, and minimize manual effort.

Background

The pilot was structured to prioritize speed to launch, minimal imposition of burden to state resources, and sufficiency of volume to test the hypotheses listed below.

IVaaS CBV will:

- provide recent income data.
- provide accurate income data.
- provide complete data for income verification.
- generate an Income Report will be easy for caseworkers to index to the right person and case.
- verify income without additional client contact or RFIs.

The pilot was not structured to provide robust metrics on case outcomes. Initial attempts to conduct case outcome analyses highlighted the need for better methods of identifying cases that used IVaaS CBV.

The state agency deferred receiving machine-readable data for future iterations and elected to receive income data in a secure email inbox that was manually accessed. Prior to making such investments, the state partner wanted to validate basic hypotheses around technical and procedural viability and compatibility.

The Medicaid pilot partner agency decided to run this same pilot again in August of 2025 with minimal changes.

Pilot C for Medicaid launched on May 18, 2025 and concluded on June 30, 2025.

Program	Medicaid
Point in Time	The state has a legislative requirement to **re-verify income on a quarterly basis.** State Quarterly Wage Data is queried to check if the beneficiary is over the qualifying Federal Poverty Line for Medicaid. If Quarterly Wage Data returns results for a beneficiary and income is over the qualifying Federal Poverty Line, the beneficiary must submit verifiable income documents to prove they are still eligible. *Note: If a beneficiary does not show up in Quarterly Wage Data, no action is taken.*
How IVaaS CBV was introduced to clients	Beneficiaries who were found to be over income in Quarterly Wage Data were sent a paper notice and text message that included a generic website address to CBV.[1] • **Mailed notices**: A generic URL was included in the copy. • **Email**: An email notification directed beneficiaries to the client portal where they could view an online version of the paper notice. Only 16% of beneficiaries were enrolled in email notifications. • **SMS / text**: A generic URL was included in the message. 86% of beneficiaries were enrolled text notifications.
Type of link(s)	**Generic Link** [1] Because the link was generic, not tokenized, beneficiaries needed to enter their date of birth in CBV. They had the *option* of providing

	their case number, too. Name was pulled from payroll data and included in the Income Report but was not visible to the beneficiary. The last 4 digits of their Social Security Number was also included if it was available.
How IVaaS CBV's Income Report was sent back to agency	Income Reports were sent via encrypted email to an existing inbox, State document indexers (state staff) pulled Income Reports from this inbox to associate it with the correct case.

[1] *A "generic link" means each beneficiary receives the same website address. This contrasts with individualized or tokenized addresses where each website is unique to the user. Because these forms of website addresses require lengthy URLs, they are best provided through digital means like text or email or, if on paper notices, through QR codes.*

IVaaS CBV product learnings
What could be improved within the product?

- **Search experience.** Clients entered acronyms and other terms that did not yield actionable, relevant results. It is unlikely to improve the search functionality sufficiently to account for acronyms, so more specific prompts for how to search might be useful (e.g. instead of an acronym, type the full name of the employer).
  - **Experience for clients who are unemployed or recently lost employment.** The current user experience does not help this user group realize they can use the tool or offboard them to relevant next steps. Help content is narrowly focused on finding providers / employers and logging in. The search experience doesn't provide instructions specific to this situation.

- **Log in support and off-boarding when log in fails.** Trouble logging in was a commonly viewed help topic and a point where people dropped off from IVaaS CBV. As the team learns more about log ins, stronger support and help content should be provided. When logging in presents a roadblock, IVaaS CBV should better guide clients to their next steps.

- **Payment review experience.** If a client finds the income data IVaaS CBV pulls to be incorrect, the only option is to leave a comment. Having the client validate the information is accurate or annotate what's inaccurate may be valuable to clients and caseworkers.

- **In-app feedback survey**. The survey that allows clients to provide feedback on IVaaS CBV and sign up for research sessions was only completed 5 times in this pilot period. The opportunity to provide feedback needs to be more visible throughout IVaaS CBV.

- **Unique user data.** Product data for this pilot was only available by session, not unique user. This inflated drop-off points, making it difficult to understand where there are problems in the experience and how prevalent they are.

- **Knowing where clients accessed the IVaaS CBV link.** In this pilot it was not possible to know if the client accessed the link from the text message, mailed notice, or e-notice. This is important data to collect moving forward to learn how introduction points impact clients' use of IVaaS CBV.

Pilot design learnings

What would we recommend adjusting in future pilots?

- **More context about IVaaS CBV at introduction**. Clients had taken no previous action related to reporting their income, so this notice and text message were unexpected. The paper and e-notice give the option to use CBV, but little context about it. Increasing context might increase engagement.

- **Use tokenized links when possible.** Using the tokenized link removes the need for clients to enter indexing information. It would also remove the manual indexing work for state staff.

- **More robust impact data.** To learn about IVaaS CBV's impact on case outcomes, timeliness, and RFIs, more robust data tracking and sampling would be needed. There needs to be a comparison or baseline group to compare case outcomes when using IVaaS CBV versus using existing methods. This would require an automated method to identify cases that used CBV and submitted and Income Report and a post-pilot analysis.

How did the pilot design impact engagement?

Two factors likely contributed to lower engagement and drop-off:

1. **Opting for the generic link instead of the tokenized link.**
   Beneficiaries had to enter their date of birth and optionally could enter their case number. This step resulted in drop-off.

2. **Introducing CBV after a passive data check.**
   Beneficiaries had not taken recent action to report their income. The quarterly wage check happens in the background and loops the beneficiary in only if they need to submit income verification. The call center saw several questions come in from beneficiaries who were wondering why they needed to verify their income again.

Pilot C for Medicaid Impact Summary

Section 1: **IVaaS CBV Income Reports**

1A) **Overview**

In Pilot C for Medicaid, 894 CBV Income Reports were submitted. This section examines the data gathered in submitted reports.

IVaaS CBV Income Reports

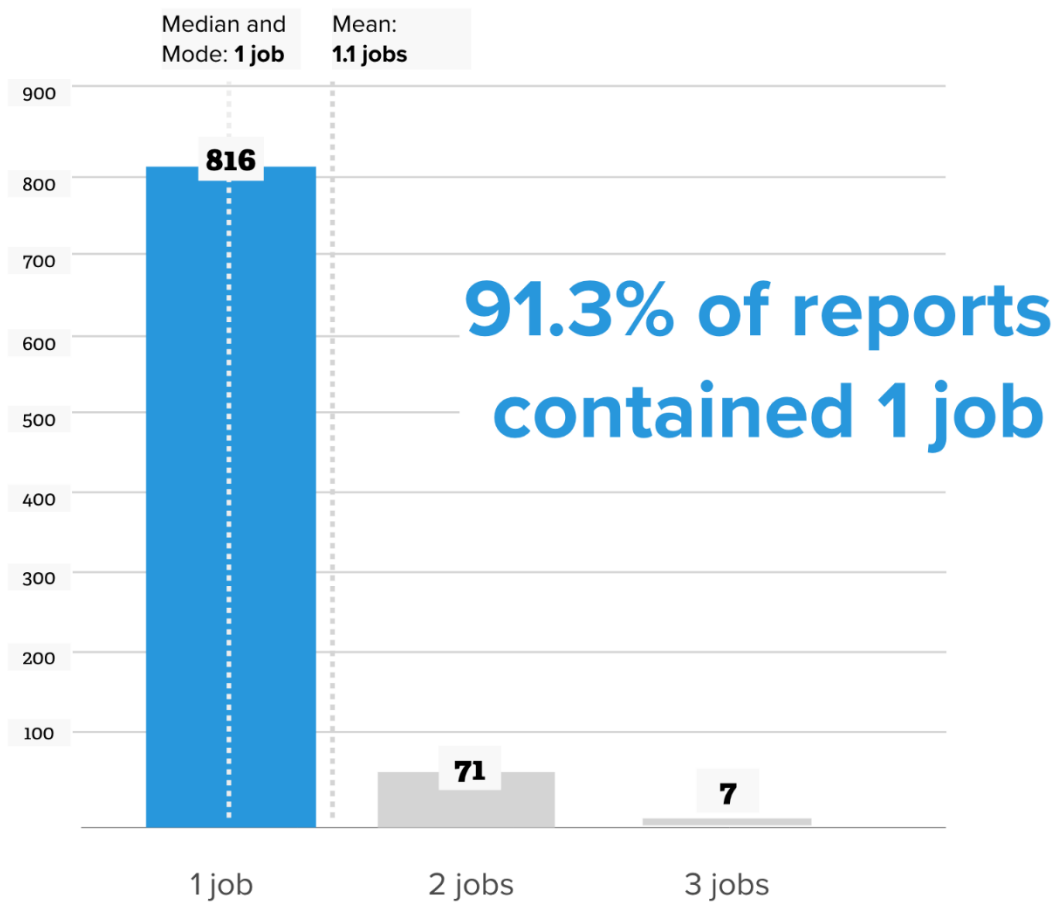|	
Total number of cases that received a link to CBV	**15,790 cases** All cases received a mailed notice with CBV link. Of those 15,790 cases, some received: • Email with link to notice in client portal (2,541) • Text message with CBV link (13,542)
Total number of Income Reports submitted	**894 Income Reports**
Number Income Reports with a W2 job	**871** (97.43% of Income Reports)
Number of Income Reports with an app-based gig job	**20** (2.23% of Income Reports)
Number of Income Reports with both W2 and app-based gig job	**5** (0.56% of Income Reports)

Hypothesis results

Hypothesis	Result	Explanation

CBV will provide **recent** income data.	**Validated**	*85% of jobs included in CBV Income Reports had income data from the last 14 days.*
CBV will provide **accurate** income data.	**Partially Validated**	*Case reviews done by the state agency and sentiments from the front-line staff survey suggest CBV data was accurate, complete, and easy to index, but more detail is needed.*
CBV will provide **complete** data for income verification.	**Partially Validated**	
CBV'S Income Report will be easy to index to the **right person and case**.	**Partially Validated**	
CBV will verify income **without additional client contact or RFIs**.	**Partially Validated**	*Pilot metrics tracked cannot draw conclusive results on impact to cases and case outcomes. According to caseworker survey data, 77.7% reported they "rarely" or "never" needed additional information from clients.*

1B) **Income data gathered by IVaaS CBV**

How many jobs were included in the Income Reports?

Median and Mode: **1 job**

Mean: **1.1 jobs**

91.3% of reports contained 1 job

1 job	2 jobs	3 jobs
816	71	7

- **The median Income Report contained 1 job.**
- **The highest number of jobs in an Income Report was 3 jobs.**
  - 7 (0.78%) of the 894 Income Reports had 3 jobs.
  - *Note: See Section 2: Client Experience for how number of jobs impacted time to complete CBV.*

How "fresh" or recent was the income data?

- **85% of jobs included in IVaaS CBV Income Reports had income data from the last 14 days.**
  - 14% of these jobs had a pay date in the last 2 to 4 days.
  - 47% of these jobs had a pay date in the last 4 to 8 days.
  - 10% of these jobs had a pay date in the last 8 to 12 days.

- **Of the 15% of jobs that did not have income data from the last 14 days:**
  - 6% had a pay date in the last 14 – 90 days.
  - 9% did not have a pay date in the last 90 days (which can be used to prove termination from a job and loss of an income source)

- **Payroll and gig platform accounts had sufficient data necessary for an income verification 99.5% of the time.**
  - Reasons an account might not meet the valid data threshold:
    - Payroll account does not contain the name of the employer making the payments
    - No gross income/net income but evidence of hours worked

What income data was available was through IVaaS CBV?

- **Hours Worked.** Hours worked was available **87.28%** of the time for W2 platforms and **97%** of the time for gig platforms.
  - In accounts that don't include hours worked, HR1 work requirements could be determined by dividing the hours worked by the federal minimum wage to create an estimate.
  - 97% of gig platform accounts connected include the hour duration of the gigs worked. The only gig platforms that did not return hours were Grubhub and Rover (2 people connected to these gig apps).

- Among the jobs connected that were included in an Income Report:
  - **Termination date** was included for **70.59% of jobs** that had an employment status other than "employed".
  - **Employer phone number** was provided for **98.65% of jobs.**
  - **Last 4 digits of Social Security Number (SSN)** was included for **87.09% of jobs**.
    This simply means that some payroll companies and many gig platforms did not record SSN. This does not mean that the applicant did not have an SSN.
  - **Date of Birth** was included for **77.43% of jobs**.

How did IVaaS CBV Income Report data compare to other verification methods?

Note: Data shared in this section is based on 64 case reviews. The state agency conducted these reviews to compare the Income Report to Equifax's The Work Number and/or State Quarterly Wage Data.

- **5.2% of all Medicaid cases that received a notice in May used IVaaS CBV to verify their income.**
  - 43% of all Medicaid cases that received a notice responded to the agency's request for income verification.

- **IVaaS CBV Income Reports verified income for 85.7% of the cases reviewed.** 54 of the 64 cases reviewed used the CBV Income Report to verify income for the case.

- **In comparing the IVaaS CBV Income Report to Equifax's TWN and/or State Quarterly Wage Data, the agency found 10 cases where data differed.**
  Of the 64 cases reviewed:
  - **10 cases that submitted CBV Income Reports provided different income data.** *Note: The team is working with the State agency to get more details on additional discrepancies.*
    - **In 2 cases CBV showed no recent payments from the employer.** In both of these cases, the client added a comment to their CBV Income Report stating that the payment data was inaccurate.
      - In 1 of the cases, The Work Number showed consistent biweekly income.
      - In 1 of the cases, Quarterly Wage Data showed earnings in the second quarter of the year.

- **In 1 case CBV was missing payments**. 2 payments but missed 3 additional payments. The Work Number showed all 5 payments.

1C) IVaaS CBV Coverage

- **IVaaS CBV provided a high search coverage rate. 99% of searches returned at least one search result.**
  - **IVaaS CBV did not return search results for 71 of 7,330 searches (0.97% of searches).** This means while clients conducted a search, the term they searched resulted in zero employers, payroll providers, or gig apps.
    - 28 searches were unknown characters or numbers.
    - 14 searches were local restaurants, insurance brokers, or LLCs.
    - 2 searches were for a State agency acronym.
    - 8 searches were for websites (6 were for the same restaurant, 2 were for a payroll website).
    - 1 search was for "just started a new job have not got paid yet"
    - 1 search was for "Walmart" but included a specific address.
    - 17 searches were unknown acronyms or employers.

- **Of the 7,259 searches (99.03%) that did return results:**
  - More than 5 results were displayed in 88.62% of searches.
  - Between 1 to 5 results were displayed in 10.41% of searches.

- **The most common search queries were:**
    - Walmart
    - UKG
    - Ochsner
    - Unemployed
    - Dollar General

Section 2: **Client experience**
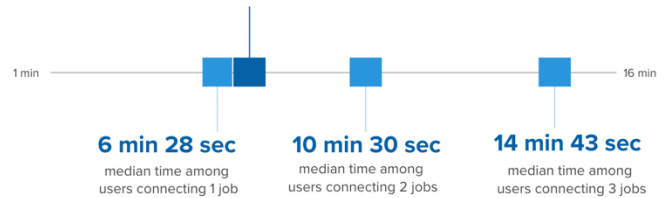
2A) **Overview**

This section provides details on the experience clients had with IVaaS CBV in Pilot C for Medicaid. The data in this section pulls from CBV product metrics and 5 survey responses.
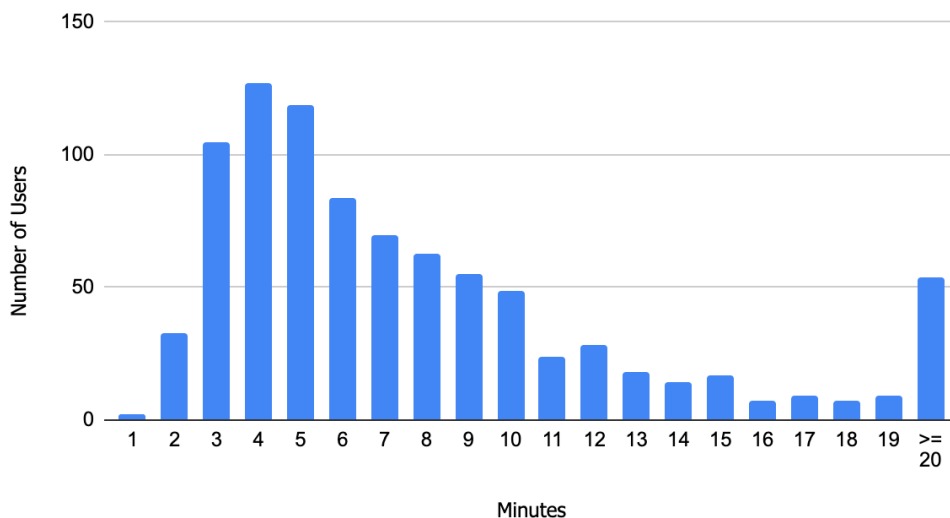
894
Income Reports

25
app-based
gig workers

871
W2 workers

6 minutes 39 seconds
median time it took users to complete CBV

1 min .... 16 min

6 min 28 sec
median time among
users connecting 1 job

10 min 30 sec
median time among
users connecting 2 jobs

14 min 43 sec
median time among
users connecting 3 jobs

2B) **Time to complete IVaaS CBV**

- **Among the successful reports submitted** (n = 894)**, it took the median client 6.65 minutes to complete IVaaS CBV.**
  - 90% of clients who submitted an Income Report completed the IVaaS CBV flow in 15.53 minutes or less.
  - 10% of clients who submitted an Income Report completed the IVaaS CBV flow in 3.6 minutes or less.

Session Time to Complete IVaaS CBV

Bar chart. X-axis: Minutes (1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, >=20). Y-axis: Number of Users (0 to 150).

- **The number of jobs a client connected to impacted time to complete:**
    - Median completion time for **1 job: 6.47 minutes**
    - Median completion time for **2 jobs: 10.5 minutes**
    - Median completion time for **3 jobs: 14.72 minutes**

2C) Client engagement and adoption

How were clients introduced to IVaaS CBV?

About one day after the state system determined the beneficiary was presumptively over income according to state Quarterly Wage Data, the state Medicaid system sent out:

- **A paper notice via mail with a generic link to CBV.**
    - *For cases enrolled in email notices:* Email notice linked beneficiaries to the client portal with an online version of the paper notice.
    - *For cases enrolled in SMS:* A text message (SMS) with a generic link to CBV.

    > **SMS / Text Message:**
    > *"[State] Medicaid: To maintain your coverage, you need to report your income. Please report your income here: ReportMyIncome.org. Deadline: [Date]. For questions, call 1-888-342-6207. Reply STOP to end texts."*

Beneficiaries enrolled in text messages who had not responded to the RFI also received a reminder text message on May 24, 2025. This text did not contain a link to CBV.

Who used IVaaS CBV?

Across the 894 Income Reports:
- Most clients (66%) were between the ages of 19 and 49.
  Note: This data is derived from payment platforms when date of birth is available after the client successfully logged into an account.
- 97.43% of Income Reports contained a W2 job.
- 2.8% of Income Reports contained a gig job.
- English was used in 99.56% of IVaaS CBV sessions.
- Spanish was used in 0.51% of IVaaS CBV sessions.
  Note: This State has a small population of Spanish speakers.

66% of users
were between 19 and 49 years of age
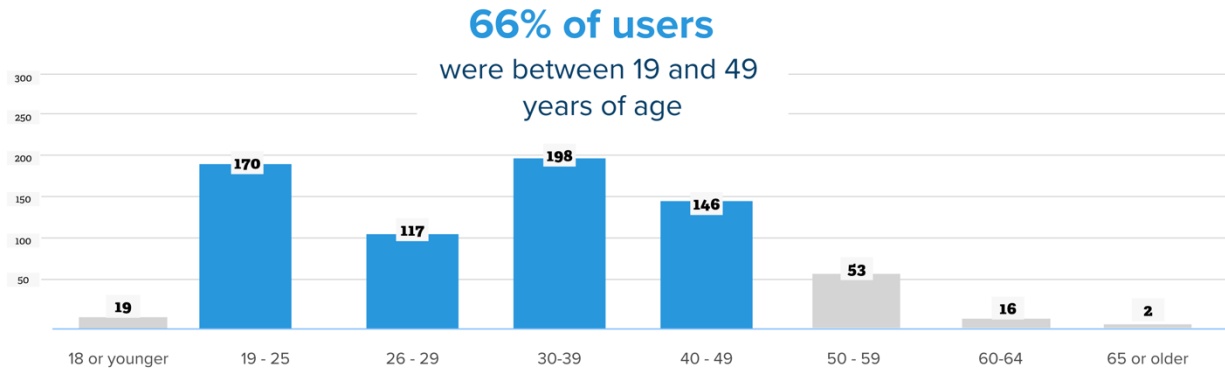
In 246 cases, CBV did not infer age from pay data. These instances are not represented in the chart above.

What devices did clients use to access IVaaS CBV?

Note: Data shared in this section is based on sessions, not on unique users or even devices. Subsequent pilots will have better tracking capabilities.

Device	Number of sessions	Percent of all sessions
Mobile	**13,711**	**84.17%**
Tablet	35	0.22%
Desktop	2,427	14.9%

How many clients were able to submit an Income Report? Where did clients drop off?

Note: Data shared in this section is based on sessions, not on unique users or even devices. Subsequent pilots will have better tracking capabilities.

Conversion and drop-off across IVaaS CBV steps				
#	Step	Explanation	Number of interactions	Percent conversion from previous step
1	**Received a link to IVaaS CBV**	*Clients who were sent a link to CBV by the agency.*	15,790	-
2	**Clicked IVaaS CBV link**	*Number of times the link was clicked*	16,285	-
3	**Consented and viewed search page**	*Number of times consent terms were agreed to and continued to next page.*	5,354	**32.88%**
4	**Opened login modal**	*Found an employer or platform and clicked on it.*	3,395	**63.41%**

| 5	Attempted login	Entered username and password on a platform to attempt logging in.	2,082	**61.33%**
6	Login succeeded	Successfully entered login credentials to their platform.	1,141	**54.8%**
7	Viewed payment details	Reviewed the income data IVaaS CBV pulled from the platform they logged into.	1,074	**94.13%**
8	Entered indexing details	Because the link was generic, the client needed to enter date of birth. They also had the option to enter their case number.	930	**86.59%**
9	Submitted report	Consented to legal agreement and submitted income data.	894	**96.12%**

Observations about engagement and drop-off:
- Half of the sessions that attempted log-in succeeded (54.8%).
- 78.35% of the sessions that made it through log in (n=1,141) submitted a report (n=894).
- The most significant session drop-off is on the first two pages before searching for an employer (32.88% of sessions converted from viewing the entry page to viewing the employer search page).
  - This could be attributed to people clicking the link and deciding to come back and finish the process later. Future pilots will track distinct user devices instead of sessions.
- There is a notable drop-off when users are asked to enter indexing details (i.e. clients needed to provide their date of birth and could optionally provide their case number). Of the 930 sessions who could have submitted an Income Report without this page, 36 sessions dropped off (13.41%).

Hypotheses about drop-off:
- There is a large amount of drop-off in sessions between Viewing the IVaaS CBV entry page and moving onto the employer search page because:
  - Users are opening the link multiple times before proceeding.
  - Users are opening the link when they receive the text or notice, then leaving.
  - Users do not want to use CBV or are unsure what it is.

- Switching to a tokenized link would increase submission rates by removing the additional step of users entering indexing information.

How did clients search for and find platforms?
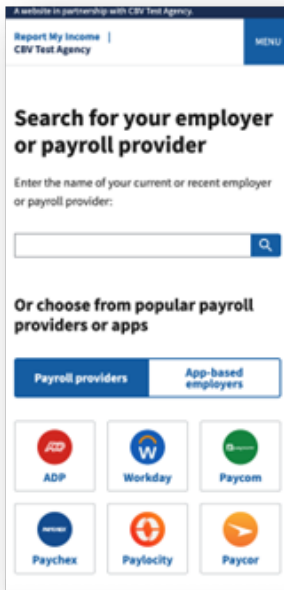
Clients have four ways of finding their payroll or gig platform when they use IVaaS CBV:

Option 1 and 2: The employer search page provides common payroll providers and app-based employers which clients can click on and immediately begin logging in.

Option 3: If they know the name of their payroll provider and it is not listed, they can search for it.

Option 4: If they do not know their payroll provider, they can search by their employer name and the search results will take them to the payroll provider for that employer.

Searching for and identifying payroll and app-based gig platforms					
Search method		Number of interactions	Percent of all interactions	Number of successful logins	Percent of search method that were successful at logging in
Clicked on platform icon	Payroll provider icon	1,318	38.9%	495	37.56%
	App-based gig platform icon	65	1.91%	34	52.31%
Used search bar		2,006	59.19%	607	30.3%

Observations about searching for platforms:
- **The majority of sessions used the search bar, but this resulted in the lowest login success rate** (30.3% of these searches resulted in successful login).
  - When the app-based gig platform tile was used, it resulted in more successful logins (52.31% of these logins were successful).

- **The search experience is not designed well for individuals who have had recent job loss or are currently unemployed.**
    - *"Unemployed"* was searched for 50 times.
    - *"None"* was searched for 29 times.
    - *"Unemployment"* was searched for 5 times.
    - *"Not employed"* was searched for 4 times.
    - *"N/a"* was searched for 2 times.
    - *"None"* was searched for 2 times.
    - *"Na"* was searched for 2 times.
    - *"Not employed"* was searched for 2 times.
    - *"No employer"* was searched for 2 times.
    - *"I'm unemployed"* was searched for 1 time.
    - *"Unemployment insurance benefits"* was searched for 1 time.
    - *"NOT EMPLOYED"* was searched for 1 time.
    - *"Don't have one"* was searched for 1 time.

- **Some clients are trying to use IVaaS CBV to search and log into their social security benefits, which is currently not supported since it is unearned income.**
    - *"Social Security"* or a similar wording was searched 7 times.
    - *"SSDI"* or similar wording was searched 6 times.

- **In sessions where an Income Report was submitted, clients searched fewer times.**
    - In sessions where a report <u>was</u> submitted, clients searched 1.59 times.
    - In sessions where a report was <u>not</u> submitted, clients searched 2.37 times.
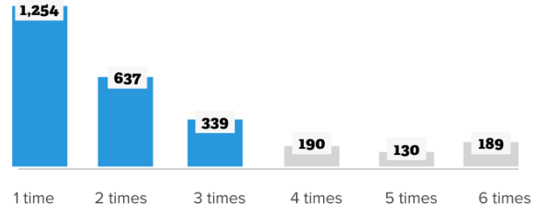
1.59 searches

median number of searches
in sessions that submitted
an Income Report

390	66	37	12	8	15
1 time	2 times	3 times	4 times	5 times	6 times

2.37 searches

median number of searches
in sessions that dropped off

1,254	637	339	190	130	189
1 time	2 times	3 times	4 times	5 times	6 times

How did clients troubleshoot or seek help content?

The help modal was opened 615 times, primarily from the help banner (n=404 or 66% of all help modal openings) that is displayed when clients close the login modal and return to the search page.

Help Topic	Number of sessions that selected & viewed help topic	Percent of all sessions that viewed a help topic
Payroll Provider *I don't know my payroll provider*	176	24.44%
Employer *I can't find the correct employer*	159	22.1%
Login Credentials Discomfort *I don't feel comfortable entering my login credentials*	119	16.52%
Username *I don't know my username*	100	13.89%

Password *I don't know my password*	70	9.72%
Company ID *I don't know my company ID*	96	13.33%

Observations about help modal views:

- 13 of the 894 Income Reports were submitted after viewing a help topic.
- Only 4% of session who viewed a help topic (n = 328) successfully submitted an Income Report (n = 13).
- The most common help topics viewed (collectively 46.54%) are related to finding an employer or identifying a payroll provider, which could explain reasons for drop-off earlier in the IVaaS CBV experience.
- The second most common help topics (collectively 36.95%) are related to login challenges.
- Discomfort entering login credentials (16.52% of views) could also explain some of the drop-off early in the IVaaS CBV experience.

How did clients feel about IVaaS CBV? What feedback did they provide?

Only 5 clients filled out the IVaaS CBV survey in this pilot. The low number of responses prompted the team to redesign the survey and the parts of the IVaaS CBV website that link to this survey. Below are the 5 client responses the team received:

- Difficulties logging in
  > *"I'm trying to share my payroll data through my employer, and I'm allowed to enter my work email and password, but when I get an SMS message with the verification code every time I put it in it says 'an unexpected error occurred."*

- Confusion about what to do if recently unemployed
  > *"None of these are letting me report my income I used Gusto and am now unemployed"*

- Unclear
  > *"I don't know"*

- Positive experiences
  > *"Good experience so far."*

  > *"Simple and to the point"*

Section 3: **Eligibility Worker & Agency Staff Experience**

3A) **Overview**

Because Income Reports were sent via encrypted email to the state agency's existing inbox, a specialist needed to index Income Reports to the correct case for an Eligibility Worker to review.

3B) **Caseworker Sentiment**

- **CBV's Income Report provides robust, recent income data to caseworkers which eases and speeds up the income verification process.**
  In Pilot C, 139 caseworkers completed a survey after the pilot concluded. In that survey, caseworkers said it was:
    - **Easier to verify income using IVaaS CBV:** 79% agreed or strongly agreed
    - **Faster to verify income using IVaaS CBV:** 80% agreed or strongly agreed
    - **More complete information using IVaaS CBV:** 73% agreed or strongly agreed

- **In the majority of cases, caseworkers said IVaaS CBV's Income Report verified income without additional information.**
    - **77.7%** of caseworkers reported **never or rarely needing additional information.**
    - **18%** of caseworkers reported **sometimes needing additional information.**
    - **4.3%** of caseworkers reported **often needing additional information.**

    "CBV makes it so much easier to able to locate the information you need, enter it, and be able to move on to other things."

    "I spent more time entering the income because it was provided for 90 days. It took more time away from other tasks but it will be beneficial in the future because with will have more months of actual income which shows a complete picture of yearly income."

    "I spent the same amount of time working these tasks as regular paystub tasks."

    "The CBV is a good app but it does not give us information about VA pensions and other pensions/retirements that is received by the client."

    "Less time gathering and looking for stubs [paystubs]"

    "A lot of times members will self-attest to their net income and will send screenshots

of their take home pay as opposed to their gross income. Using CBV, I don't have to contact the client to request their gross income which results in fewer overdue tasks due to waiting on the client to respond."

"It was very nice not having to mentally calculate whether it was a biweekly or weekly payment. It was extremely nice that you spend less time examining the check stub to make sure you find the correct hours worked, pre-tax deductions, the employer (listed or not), and the gross amount. Everything you need is in an easy to read format making the flow of inputting this information into an income worksheet smoother and quicker."

- **Caseworkers reported that IVaaS CBV Income Reports always or usually matched other income sources.**
    - **35.3%** of caseworkers reported that Income Reports they reviewed **always matched** other income verification sources.
    - **44.6%** of caseworkers reported that Income Reports they reviewed **usually matched** other income verification sources.
    - **18.0%** of caseworkers reported that Income Reports they reviewed **sometimes** matched other income verification sources.
    - **2.2%** of caseworkers reported that Income Reports they reviewed **rarely** matched other income verification sources.

3C) Other State Staff Sentiment

- **Staff reported that indexing CBV Income Reports was easy or very easy.**
  In Pilot C, 13 staff who match submitted documents to the correct case completed a survey after the pilot concluded. In that survey, caseworkers said it was:
    - **61.5%** reported indexing Income Reports was **very easy**.
    - **23.1%** reported indexing Income Reports was **easy**.
    - **15.4%** reported indexing Income Reports was **neither easy nor difficult**.

- **Compared to other income documents submitted, IVaaS CBV Income Reports were slightly easier to index to the correct case.** Among staff who filled out the survey:
    - 53.8% reported that it was easier to associate metadata from the CBV Income Report compared to other income documents.
    - 46.2% reported there was no difference for them.

      " It was neatly typed which was a huge help. All information was in the same place which made it a bit easier to find the information for quick reference."

      "Information is clear and detailed"

- **3 staff reported having issues indexing IVaaS CBV Income Reports to the correct case.**

  > *"If the last 4 digits of social security number was not included it was harder to associate the metadata. It was even harder to locate clients when last name was different in our system. It would be helpful if SSN/case number is included in the report."*

  > *"There are 2 of the CBV I could not find the person. Then something the person did not list the right name on the case. They have more than one name. They go by maiden name and the did CBV is in the married name. Need to make sure they list last 4 of SSN and DOB and name on the case and let us know that they are married."*

  > *"Some forms did not include a SSN or DOB, and it was a bit of work to match other information."*

- **Call center staff were able to identify key questions Medicaid clients had about the IVaaS CBV pilot.**
  - Concerns about the text message or link being a scam:

    > *"Client asked if the link was for Medicaid. Was concerned it was from hackers."*

    > *"Most clients called to verify that we sent the link."*

    > *"Was it real."* [i.e. Clients called to find out if the link to IVaaS CBV was legitimate or not]

    > *"Most members wanted to know if Medicaid sent the text."*