

State Site Visit Learnings

February 2024

Agenda

- Project Background
- Learnings
- Opportunities
- Next Steps

Project Background

Timeline & Site Visit

State Introduction Call

October 2023

Concept review with leadership and eligibility workers

November 2023

Site visit planning

January 2023

Technical systems overview, more site visit planning, and program office coordination

February 2023

Site Visit

February 20 - 22, 2024

4 Community Based Organizations

- 6 SNAP Assisters
- 1 Care Coordinator
- 2 Managers
- 4 Leaders
- Observed 2 SNAP Application calls

2 Program Offices (+ 1 office at a local library)

- ~12 Eligibility workers
- 4 Supervisors
- Office & Leadership
- 2 policy consultants
- Observed 7 SNAP Interviews

Site Visit Goals

Observe the income verification process

firsthand, ensuring that our designs to reduce administrative burden align with the realities and constraints of state systems and processes already in place.

Learn from and co-design with multiple stakeholders involved in income verification, including frontline and technical staff, state leadership, community-based organizations and applicants. This helps ensure that our design work reduces administrative burden for the overall system and better account for design tradeoffs.

Explore potential opportunities to pilot an income verification solution together.

A pilot is a true test of whether a solution could work for a state and can vary in length and how integrated (or not) it is.

Deliver value back to the state team, which could take the form of opportunity areas, technical assistance, design assistance, shared learnings from our consent-based verification request for information (RFI), etc.

What we learned on the site visit

Bright Spots

Staff & Supervisors

- Resilient, committed, & deeply invested in their work and applicants
- Took pride in their ability to keep the ball rolling despite heavy loads

Network of Community-Based Organizations & Assisters

- A mix of breadth and depth in partners allowing reach across the state and within specific communities
- Experts in phrasing & rephrasing questions and helping applicants navigate the information needed
- Go the extra mile any time they can with reminders, check-ins, and post-application support
- 211
- Deeply invested in getting applicants the resources they need

Technology Investments

- The state has previous experience with pilots and has experimented with great ideas that can be adopted and improved upon over time
- The state has an eligibility system that has connected front-end and back-end portals – not all States have this!

Eligibility workers are the front door to the program.

"It's a lot, but we're a resilient state."

"We all work here because we love helping people. You have to love what you do."

Eligibility workers do magic with an incredible amount on their plates.

Each week:

- Conduct 30+ interviews, often fitting in an expedited interview here or there
- Spend a day working the interview line
- Find and file documentation for applicants
- Follow up with applicants, and an applicant's family, employer or landlord to help verify details.
- Many also rotate through front desk and clerical work

Assisters are providing robust support where it's needed most.

"If the English isn't clear, the translation isn't clear."

"The plainer the language in English, the better the translation."

Translation, Plain Language, & Tools

- *Application:* Rephrasing application questions and explaining what is asked
- *Notices:* Understanding notices and translations
- *Interviews:* Some applicants reach out for help understanding what they need to do or support with translation during the interview
- *Verification Documents:* Explaining & supporting applicants in meeting requirements. Also help submit through scanning, printing, & uploading

Support Through Complexities

- *College Students:* Support meeting additional requirements and finding ways to document and prove their actual income
- *No SSN:* Navigating how to apply and demonstrate income when a parent doesn't have an SSN, but children do. Pseudo-numbers for accounts seem particularly difficult in activating benefits
- *Out of state benefits:* It is "a bit of a tug of war" trying to prove benefits have stopped in another state
- *Hearing challenges:* Supporting communications with program in an applicant's preferred dialect & language

Assisters reported that, among applicants who are working, variable income is more common than steady income.

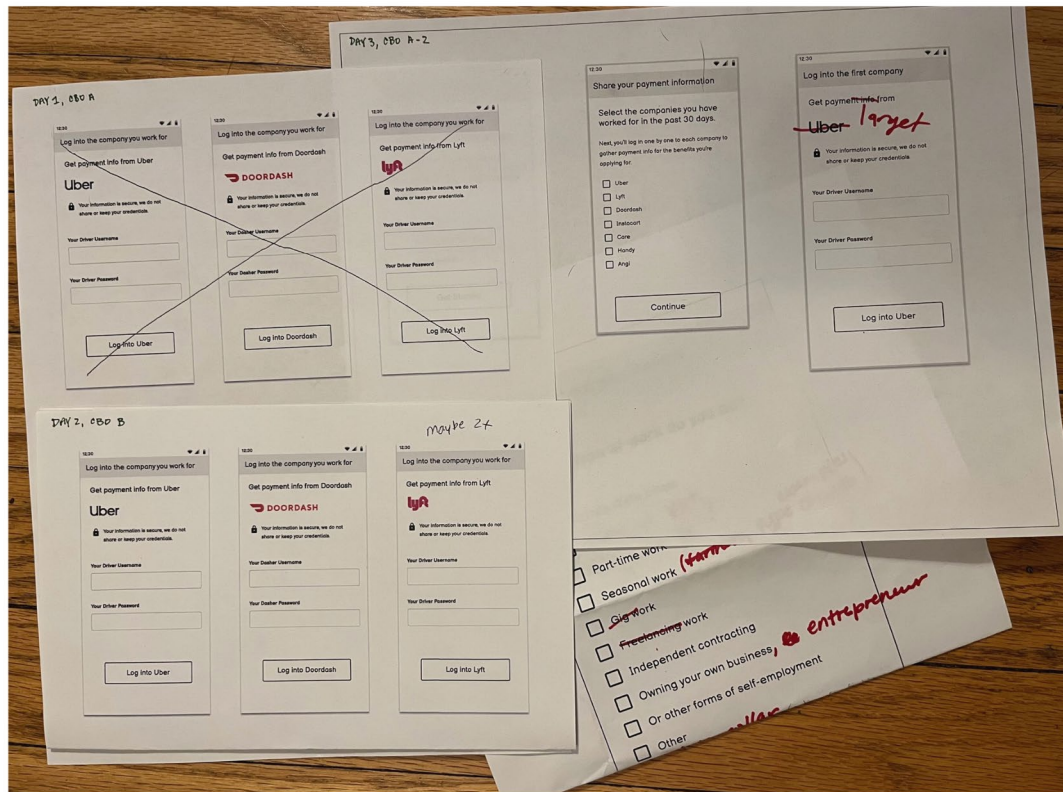
"When someone is self-employed, I try to look at their income in the last 3 months.

Then I ask them what a high month and a low month was, and average that out."

Accounting for Variance in Earnings

- *Self-employment*: work expenses also vary - not just their earnings
- *Part-time*: Hours are not consistent week-to-week despite their part-time employment
- Assisters and eligibility workers have methods for working with applicants who have variable income, but this isn't formally supported
- While self-attestation is a common method for documenting self-employment, chasing down signatures and other forms of proof can be difficult

Our *current* Consent-Based Verification (CBV) concept, focused on app-based self-employment is not yet worth piloting. It should go beyond gig platforms.



- Gig platform work is not commonly seen, especially as a sole source of income
- It may be useful to see payroll providers as part of CBV
- The state has a large backlog of technical improvements and projects. With a maintenance & operations contract, the amount of work that is possible to do each month is limited
- Prioritizing text messaging projects would be more impactful to applicants and eligibility workers than an app-based self-employment CBV pilot with our team

Opportunities

Document Uploading, Sharing, & Management

Online Uploader Image Resolution

- Many documents (estimated 1/10) landing on an eligibility worker's desk are illegible or incomplete
- Photograph pixelation seems to show resolution distortion, not user error

Matching Documents with Cases

- A substantial amount of eligibility worker time (est. 8hrs/week) goes into finding and filing documents they receive
- Some documents uploaded or emailed reported to be delayed weeks

Documentation Guidance

- Tailored directions for applicants on what to upload is verbal, not written. Applicants forget exactly what to submit, resulting in calls to the helpline or submitting incomplete documentation

Bugs in document uploading

Document uploading disabled for some

- Assisters report that applicants can't upload documents after a certain point in the application.
 - Functionality is "greyed out"
 - Reported to occur even if applicants applied via the portal originally, are allowed to provide those documents by other means

Reported Impact of Issue

- Increased delays for applicant document submission
- Increased re-applications, re-interviewing
- Increased procedural denials
- Wasted eligibility worker and applicant time, duplicative work

Text Messaging

"I have not heard that [texting] has been formalized, but it would be lovely. Because how easy! Everyone has a phone these days."

Appointment Reminders

- Some Assisters are already trying to do this with applicants with calls and calendar invites. They hope to keep the applicants on track and aware of the next step, but their capacity to do this is limited

Sharing Documents

- Assisters supporting recent pilots have been excited by the opportunity for applicants to provide verification documents over text. Many come in already with photos on their phone

Closer Collaboration with Assisters

"We talked to SNAP coordinators in New York, and they spend time with the eligibility workers there. They sit down together and learn from each other.

It sounded really helpful."

State agency and Assister Shadowing

- Assisters, especially those who have "train-the-trainer" programs, would like to have closer collaborations with the state agency to ensure their support is in line with state agency expectations
- Assisters wanted more feedback on the applications they helped submit

Translation in Interviews

- Individuals who are hard of hearing and/or speak a specific dialect of a language are often underserved through the translation line
- An Assister is inconsistently permitted to provide applicant support during interviews right now

Next Steps

Next Steps & Discussion

1. **Procurement support** (if desired)
2. **Stay in contact** as we move forward with a new concepts based on what we learned in state site visit.

Thank you!