State of Vermont

Department of Vermont Health Access
Integrated Eligibility & Enrollment Program

Charter

Customer Portal Phase 1 V 2.0

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Background

Problem

Vermonters find satisfying verification requirements to be a challenging, time-consuming, and a frustrating experience. Vermonters often ask internal staff if they can email their documents.

For internal Staff, verifying Vermonters income routinely involves delays, stressful conversations, and duplicative work. Mail and paper slow the entire process from initial notification, to mailing documents, to scanning and indexing. Internal staff wait for Vermonters submission of pay stubs, employment forms, or attestations to process applications or changes.

Phone calls become stressful when Vermonters don't understand what to do and end up being required to mail additional forms before they run out of time, or in extreme cases hand deliver documents to avoid losing benefits due to missed deadlines. Internal staff in the district offices try to help Vermonters by calling employers multiple times to verify information, while health care workers often need to search multiple systems to track down the right document. Vermonters data isn't well shared across agencies within the state systems.

Partners

Executive Sponsor: **Cassandra Madison**
Product Owner: **Athanasia Boskailo**
Project Manager: **Melissa Rancourt**
DCF ESD Representative: **Bob Hammerl**
Technical Lead: **Seamus Loftus**
Procurement Representatives: **Dixie Henry**
Security Lead: **Emily Wivell**
OCM Representative: **Devon Downing**

This team will also collaborate with a State of Vermont led strategic procurement team.
Membership: Dixie Henry; John Kohlmeyer; Diane Nealy; Jon Provost; Deborah Damore; Lucie Fortier; Stephen Fazekas; Mark Hopson (18F) and Randy Hart (18F)

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Vision

To make it easier for Vermonters to submit, and staff to process manual verification documentation.

To implement a technical solution which allows Vermonters to utilize mobile and online technology to submit verification documentation and to automate classification of such documentation. This solution will improve the efficiency of the eligibility determination process and result in a better customer experience for Vermonters.

The tool should provide:

- The ability to submit documentation by uploading online or through mobile depositing
- Simplified and automated transmission of electronic documentation
- Real Time Access to documentation for front line staff
- Auto indexing for workflow management
- Authenticated login
- Technical solution should be hosted and maintained by the State

Customer/user finds the electronic submission to be:

- Effective
  - o The customer understands how to submit complete and accurate information.
- Efficient
  - o The customer should expend the minimum resources necessary to ensure accurate and complete submission.
- Satisfaction
  - o The customer/user has positive attitude related using the product and feels comfortable.
- Learnable
  - o The customer finds the tool intuitive and easy to use.
- Memorable
  - o It is easy for the customer to remember how the system works, even after some time of not having used it
- Simple
  - o The customer can accomplish their task without needing additional assistance.
- Comprehensible/Readable
  - o The content is easy for the customer to understand and meets required accessibility standards.
- Free of errors
  - o It should easy for a customer/user to use the system and avoid making errors.
  - o Possible errors should be able to be recovered easily and major errors should never occur, and the system should prevent many types of errors (for instance checking for numbers in an alpha field or the wrong number of digits in a phone number).

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Goals Use SMART measures: Specific, Measurable, Attainable, Realistic, and Time-bound.

goal	measure(s)
Improve cooperation rates by increasing available options to Vermonters for the submission of manual verification documentation.	Measure cooperation rates before and after implementation of technology.
Minimize the manual work associated with indexing and scanning of documentation.	Analyze the workflow and number of documents manually scanned and indexed before the solution and after.
Decrease the time it takes to determine eligibility - focusing on information validation activities.	Analyze the population that lose their benefit due to delay in the documentation being received after due date vs that same population after the solution has been implemented
Minimize the cost to the Vermonter in purchasing postage and paying for gas to hand deliver.	Measure the number of Vermonters utilizing the self-service option to determine potential cost avoidance to the Vermonter.

Scope

In scope: Self Service electronic submission of documents for health care coverage and financial benefit programs.
Out of scope: n/a

Budget
Budgetary information can be found in Appendix A. Budget information is not made publicly available until project close-out due to ongoing procurement activities in the IE&E Program.

Timeline

Initiate project by   4/16/2018
Initiate procurement by   In-Progress
Complete procurement by   7/31/2018

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Complete project by	10/31/2019

Mini-Charter Version History

Date	Description	Version
05/10/2018	Initial Draft for presentation to Steering Committee	1.0
1/2/2019	Changes to Product Team Members	2.0
1/2/2019	Changes to Vision from guest login to authenticated login	2.0
1/2/2019	Changes to Budget	2.0
1/2/2019	Changes to project completion	2.0
1/31/2019	Removed use of "mini charter" and updated V2.0 Signature requirements	2.0

Version 2.0 Signatures

Name	Role	Title	Signature
Cassandra Madison	Program Sponsor	DVHA Deputy Commissioner; IE&E Steering Committee Chair; IE&E Program Sponsor	E-SIGNED by Cassandra Madison on 2019-02-05 20:15:02 UTC
Amy Marshall-Carney	Program Manager	IE&E Program Manager	E-SIGNED by Amy Marshall-Carney on 2019-02-01 18:24:27 UTC
Athanasia Boskailo	Product Owner	Healthcare Deputy Dir of Ops	E-SIGNED by Athanasia Boskailo on 2019-02-11 20:22:50 UTC