



## State of Vermont

Department of Vermont Health Access  
Integrated Eligibility & Enrollment Program

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### Charter

Customer Portal Phase 2  
Online Application

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# Charter

## Customer Portal Phase 2

### Online Application

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## Background

### Overview

**Vermonters** trying to apply for healthcare and financial assistance programs, find the process to be difficult because it is time consuming, confusing to know where (digital systems or offices) to apply, what to apply for, and needing to have multiple accounts and passwords. Each program has different timelines, requirements, and processes which are not tracked in one place. There is no centralized location for Vermonters to apply for State benefits. As a result, Vermonters must repeat the same information multiple times to different State offices simply to apply.

**Overall experience:** Phone calls and in-person interactions become stressful when Vermonters don't understand the application process and end up being required to contact other offices before they lose benefits due to missed deadlines or run out of time to apply. Vermonters' data aren't well shared across agencies within the State systems and this makes it difficult for staff to serve customers. In addition, there aren't clear next steps for what is needed from the customer to ensure they are able to be screened for all or other programs.

Healthcare staff currently do not have the option to support Medicaid for Aged, Blind, or Disabled (MABD) and Long-Term Care (LTC) applications through online or phone channels. For the healthcare programs the online application questions do not align with the paper application. The application for Economic Service Division (ESD) Programs allow for online and paper application submission, however, online submissions required staff to manually enter the information into the system.

**Currently out of compliance:** CMS requires states to have a streamlined online Healthcare application. Currently, the healthcare online application is only available for Qualified Health Plans and Medicaid for Children and Adults (MCA) healthcare programs.

Before the delivery of the single streamlined online Healthcare application, Vermont will be following mitigation and corrective action plans to comply with MABD Medicaid rules. The MABD Mitigation Strategy includes items such as phone processing of an integrated healthcare application and electronic submission of MABD information.

### Partners

Role	Name
Executive Sponsor	Cassandra Madison
Product Sponsors	Athanasia Boskailo, Bob Hammerl
Product Owner	Neira Valentic
IT Project Manager	Carmen Howe
IT Project Coordinator	TBD
Policy Advisors	Addie Strumolo, Robin Chapman, Deanna Jones, Heidi Moreau
ESD Business SME's	Amy Shaefer, Rob Williams

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DVHA Ops Director	Jennifer Boyden
Technical Lead	TBD
Procurement Representatives	Susan Whitney, Stephen Fazekas
Security Lead	Emily Wivell
OCM Lead	Patrick Farrell
Finance Lead	Marie Hayward
Business Analyst	Varun Manohar
Data Lead/Developer	TBD
Testing Manager	Josette Duarte
Testing Lead	Cheryl Willoughby
Release Manager	Michael Oak
EA Lead	Seamus Loftus
Program Technical Lead	Marcia Schels
General Counsel	Dixie Henry
Technical SME's	Mark Combs, Grant Steffens, Becky-Jo Cyr

## Vision

The Vermont Agency of Human Services (AHS) Integrated Eligibility and Enrollment (IE&E) Program's vision is to develop a modern, integrated eligibility and enrollment customer portal that provides Vermonters with a single sign-on service allowing them to easily apply to multiple benefit programs to help meet their basic needs. Utilizing agile development, modular procurements, and agile product teams, AHS IE&E has the goal of implementing an online application that not only meets State and federal standards but is user friendly for customers and staff. The technical solution should be hosted and maintained by the State.

In general, the tool should provide:

- Real time eligibility and enrollment where applicable
- A smart application that asks for only information that is needed
- Ability to self-serve
- Ability to understand next steps and timelines
- Ability to view case information
- Application data shared across programs

Customer/user finds the electronic submission to be:

- Effective
  - The customer/user understands how to submit complete and accurate information
- Efficient
  - The customer/user should expend the minimum resources necessary to ensure accurate and complete submission
- Satisfaction
  - The customer/user has positive attitude related to using the product

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- The customer/user feels comfortable because they understand what is being asked and can fill out the application themselves
- Learnable
  - The customer/user finds the tool intuitive and easy to use
- Memorable
  - It is easy for the customer/user to remember how the system works, even after some time of not having used it
- Simple
  - The customer/user can accomplish their task without needing additional assistance
- Comprehensible/Readable
  - Uses plain language
  - Accessibility for visual impairments (text, color, screen readable, keyboard...) and other impairments using accessibility requirements as a guideline
  - Accessible for people who do not speak English as a first language

For staff, the solution should:

- Be designed with staff workflows in mind
- Provide training so they are prepared for implementation and ongoing changes
- Provide communication pathways for assistance and issue reporting
- Be prepared for next steps after application is submitted

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

Goal	Measure(s)
Decrease the duplication of data reported by newly enrolled Vermonters across healthcare and financial programs within six months of the online application release.	<ol style="list-style-type: none"><li>1. Total households in both healthcare and financial programs</li><li>2. Total number of applications Vermonters must fill out to apply for programs will decrease by 50% if they complete the online application</li><li>3. Number of questions Vermonters must provide answers to more than once will decrease by 40%</li></ol>
Increase Vermonters' ability to self-service Aged, Blind, and Disabled (ABD) and Long-Term Care (LTC) within six months of the online application release.	<ol style="list-style-type: none"><li>1. Total ABD applications submitted in paper will decrease by 10%</li><li>2. Increase channels for which customers can apply by adding online and phone mediums</li></ol>
Improve staff ease of use by 10% within six months of the online application release.	Before/after staff ease of use survey

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### Scope

There are three workstreams in scope for the Online Application project:

1. To develop a streamlined online application which allows Vermonters the ability to easily apply to multiple programs to help meet their basic needs. The programs are all [IE&E in-scope programs](#).
2. Integrate the new streamlined online application with existing systems and workflows.
3. Connect Authentication solution to identity proofing solution and interact with online application.

The Online Application plays a role in the MABD Mitigation plan to meet CMS requirements.

### Out of Scope

The following items are not in scope for the Online Application project:

1. Change of circumstances
2. Renewals

### 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	7/1/2019
Initiate procurement by	7/1/2019
Complete procurement by (last module)	6/1/2020
Complete project by	12/31/2020

### Charter Version History

Date	Description	Version
6/24/19	First version of Charter	1.0

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### Version 1.0 Signatures

Name	Role	Title	Signature
Cassandra Madison	IE&E Program Sponsor & Steering Committee Chair	Deputy Commissioner Department of Vermont Health Access	
Amy Marshall-Carney	IE&E Program Manager	IE&E Program Manager	
Neira Valentic	Product Owner	Business Process Coordinator	