**(6/19)**

**Our Research Objective:**

The broad goal of our research project is to analyze how reducing barriers to participating in multiple programs leads to increased program enrollment and also to improved well-being. We think Virginia, unlike many other states, is an ideal case study to analyze this question, given the mechanisms put in place to facilitate easier access to multiple programs (e.g., through CommonHelp).

**Broad Themes of Interest:**

We are interested in constructing a precise timeline of changes in the administration and processing of applications to multiple programs, and the extent to which this relates to the launch of CommonHelp. Specific themes of interest include:

* Changes in the way clients could simultaneously self-screen for eligibility in multiple programs (paper or online).
* Changes in the way clients could apply for multiple programs in a single application (paper or online).
* Changes in the way caseworkers could process and evaluate applications via a single internal database (e.g., through pre-population on VaCMS).
* Transition from paper eligibility screening/applications to online eligibility screening/applications.

**Specific Questions:**

1. When could clients 1) screen for eligibility simultaneously for multiple programs and 2) apply for benefits using one application?
   1. We found evidence that (1) was possible online as early as 2004 and (2) was possible via paper as early as 2003.
   2. It would be great to know the dates that both of these rolled out.
2. In reference to the first 3 phases of “CommonHelp” between 2003-06 (from Jeanne’s email on June 5th), how much of the intervention was public-facing (e.g., for clients) versus internal-facing (e.g., on VaCMS)?
   1. I.e., when child care was the first program affected in 2003 and other programs like SNAP, TANF, and Medicaid were affected in 2005, were there other changes besides pre-populating records into VaCMS? Did these policy reforms affect clients' experience with the application process?
3. We found some information about the Virginia Food Connection, which allowed individuals to apply online for SNAP, WIC, and emergency food assistance starting in the mid-2000s. Was this related at all to CommonHelp or VaCMS? Did this enable any pre-population of VaCMS with SNAP records?

* *Titled the Virginia Nutritional Assistance Program (VNAN)*
  + *Work group composed of different state agencies?*
  + *Angela Morse was heavily involved in this*
* *When going to CommonHelp, people lost some of the ability from VNAN*
  + *Even though the program was state supervised, it was locally administered*
  + *The calendar functionality was messed with*
    - *Caused somewhat of a backlog for caseworkers*
    - *Sensitive time-window for entering information*
  + *This could be a problem for SNAP/Medicaid*
    - *SNAP is paid on the first of the month. If an applicant fills out an application on the 30th and the caseworker doesn’t see it until the 1st then that applicant loses a month of benefits*
* *WIC was included in the Virginia Food Connection*
  + *VDH was on the work group for VDC*
  + *Separate online link for WIC following VNAN (VFC) but the online application was not well maintained?*
  + *WIC will be added to CommonHelp in the future*
* *VNAN (VFC) was new and successful for it’s time (2007)*
  + *People used it*
  + *$800,000 in federal outreach grant*
    - *Portion of this used to build VNAN*

4. Our understanding is that Deloitte was initially contracted to work on a website for online child care applications but the project was later expanded to include other programs. Was a site or page on VDSS ever created for online child care applications? Perhaps as a pilot?

* *No online application type*
* *Child Care was not part of benefit programs until 3 or 4 years ago*

5. In the 2012 rollout of the CommonHelp website, our hunch is that the primary changes were: 1) clients could check eligibility for and apply to several programs online via an easy-to-use interface and 2) caseworkers could work with application data, which were pre-populated into VaCMS, that were shared by clients via the CommonHelp portal.

* Is this accurate? Were there other key changes either for clients receiving services or caseworkers?
* Did this include the ability for clients to upload documents onto the CommonHelp website? If not, when was this feature enabled?
  + *One of the last changes to CommonHelp was to upload documents. VaCMS could would receive notices and be able to download notices from VaCMS system?*
  + *For example, in 2013 you’d have to drop off or mail or fax your physical documentation*
    - *VDSS caseworkers had interfaces, however, to get things like birth certificates or social security information, or tax information*
    - *More tech savvy within VaCMS?*
    - *Access to data services (these interfaces) were added post CommonHelp?*
    - *The number of paper materials that needed to be sent in reduced from 2013-2016*
      * *Highly dependent on each case and whether you could locate these persons in other systems (caseworkers interfaced with places like Homeland Security)*
      * *If unable to find information via interface, you’d have to reach out to the applicant (e.g., you couldn’t find their immigration status)*
  + *Medicaid ushered in the “you need to do this online” mentality?*
    - *90/10 funding made states less conservative in how they handled their eligibility systems*

6. Prior to the launch of the CommonHelp website, is there good data on the most common ways people applied for programs? After CommonHelp, how often did clients continue to apply for benefits using non-online methods?

* *There might be some old stuff in a data warehouse to learn about how people applied*

7. What changes occurred to CommonHelp as a result of MAGI eligibility for Medicaid, and what was the reason for having two separate “doors”?

* *Separate application was available online (required feature)*
* *When the second door was built, a failsafe was added in the background that could flip you to applying to the other door (apply to all programs) if you wished*
* *Only necessary additional fields were given to the applicant to fill out*
  + *Apparently very dynamic for it’s time (2013-2015)*
* *Applicants could just apply for Medicaid, and through the application process they may be encouraged to apply for other programs (after which they would be flipped to that application process if they chose to do so)*

**Internal questions (don’t email):**

* follow up on initial application vs recertification in phase 3 - to what extent did it make easier for caseworkers to enter recertification info into VaCMS?
* We were not able to find any public references to CommonHelp before 2012 and so wonder if this was a separate process from the CommonHelp reform or was part of a broader endeavor that fell under the CommonHelp umbrella?

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**VDSS Meeting Notes (General):**

* Personnel:
  + Angela Morris
    - Eligibility Head
    - Systems Owner
    - CommonHelp
  + Bob Erons
    - Director of Research and Planning
  + Amanda Kay
    - Division of Benefit Programs
    - Transitioning into project management role
  + Kavansa
    - Program manager for Business Operations and IT
    - Technical Support
  + Jeanne Rock
    - Prior experience in information technology area
    - Worked on CommonHelp
    - Retired but hired for part-time position
  + Amy Phillips and Kevin (Acting CIO) missing from call but would be valuable
    - Reach out?
  + Jeanne and Morse have the most information on the timeline of CommonHelp specifically
* CommonHelp generally:
  + Lot of institutional knowledge about CommonHelp has unfortunately been lost, like many other organizations
  + Redesign of CommonHelp website in the works
    - Emphasis on plain language
      * Moving away from dividing out by programs and using technical jargon
        + “Are you hungry?” instead of “Apply for Food Stamps”
        + Focus on accessible language
    - Community partners, stakeholders, citizens who may be users in the process of design (human centered design)
      * People with lived experience
    - Make the website easier for people
      * Issues with front end being locked down with security controls
        + People can’t get in
        + Data to support this
    - Mobile App
  + VDSS staff appreciates the research project as being a good way to compare what CommonHelp was before the new upcoming update (phase 6) and after the update
  + Only about 15% of applications currently come through CommonHelp (consistently fairly low since inception)
    - The goal is to flip that so 85% of applications come through the website
    - Question ~ is this an additional 15% or just people switching around between different applications?
      * Not sure
      * Opening up more “channels” (no wrong door attitude) has contributed to reducing program churn
        + Recipients less likely to miss absolutely necessary due dates for materials or actions
      * Participation largely just ebbs and flows with the economy
        + Uptick recently due to COVID and an “always eligible” population finally receiving benefits
  + CoverVA has done (maybe still does) phone applications
    - Could apply to Medicaid, SNAP, TANF, and then workers on the phone would send over those applications to the relevant local department for processing
  + Enterprise phone system around 2013
    - Angela Morse helped do contract work for this endeavor
    - Still exists
    - Can help people fill out CommonHelp application
  + Phone applications have jumped since pandemic
    - Most people did in-person or CommonHelp prior
    - Now since COVID, phone applications are on the same level
  + Benefit of CommonHelp largely was the prepopulation aspect
  + CommonHelp used to use DMV to verify that a person was who they said they were (maybe around 2013), before they could create a password
    - Barrier to applying
    - Since been removed
    - Now applicants have a client ID
    - VDSS staff still advocates for easier applicant identification
  + Takes about ~45 minutes in Virginia to apply for SNAP
    - Some states take only around 25 minutes
  + VDSS aims to work with community partners on CommonHelp (hard to follow this part of convo so bulletpoints may make no sense)
    - Waiver, stakeholder outreach
    - Will be able to accept applications from applicants
    - No voice clip and other stuff
    - Another group of people that haven’t used CommonHelp now using CommonHelp
  + CommonHelp only available in English or Spanish
* Self-Screening in CommonHelp
  + Don’t tell people they are ineligible
    - Tell them they may be or may not be eligible?
    - Ability to continue application even if eligibility application says “you may not be eligible”
      * Emphasis on not preventing people from applying
  + Eligibility screening tool is a separate window or door
    - Can be bypassed
    - However, it is encouraged
* Developing CommonHelp
  + Lots of changes to paper applications preceding Commonhelp
    - Maybe I (Dylan) can try to find see if these pdfs change over time
  + IT started with design and sessions for online eligibility design in 2003, not implemented later until 2004
    - Started doing screening for Child Care first
      * Later rolled out to Food Stamps, TANF, Medicaid
      * Able to use VaCMS for Child Care First
      * Applications for TANF, SNAP, Medicaid would originally go to ADAPT system
  + Question ~ Would caseworkers take the paper application and then enter it into VaCMS or ADAPT?
    - Yes, for the paper applications
    - Then the CommonHelp website came along
      * Mentioned something about MyWorkSpace
  + 2013/2014 is when VaCMS was adapted for other programs
    - Medicaid went in first around October 2013 (MAGI Medicaid for Families and Children)
      * ACA enacted around this time
        + Used 90/10 funding to build out the rest of VaCMS
    - 2014/2015 for SNAP/TANF
      * Imported in together
    - This is only referencing different data systems for caseworkers
      * Applicants could still at this point apply to multiple programs online
    - Caseworkers originally had to work with several systems (AMIS?, VaCMS, and ADAPT
  + When was the multi-program application (paper)
    - Around 2003, there was a transition to simplified reporting?
    - Other programs wanted to do a simplified approach (Medicaid, etc.)
    - Screening sheet existed
      * Customers would come in to local department and do screening sheet first sometimes
        + Tearaway sheet existed on front of paper application which was a way to expedite Food Stamp screening
* Question ~ Despite the vast amount of people submitting paper applications, did this paper application process change at all from the caseworkers perspective?
  + Different caseworker experience based on what LDSS they worked at
  + Couple of different ways to do entry work
    - Direct option?
    - Rapid data entry
  + Some LDSS don’t have a sufficient admin staff and so all work goes straight to the caseworker
* Input from Michelle Thomas ~ Snap Program Manager
  + Question - When was the application streamlined (14-pager)?
    - Late 1990s
      * One application process
    - Couple of redesigns
      * Around 2006 or so
      * Streamline on application itself redesigned in 2007?
      * Redesign included an automatic application for SNAP if there’s an application for TANF
        + Happened in post welfare-reform period (late 1990s)
  + They have a copy of an application that was designed but not implemented due to costs
  + Current version of application now is around 12 pages or so
    - Took Medicaid out
      * Now there’s a second path into health screening
    - Completed around 2012-2013