Title: Health and Human Services Transformation through Ohio Benefits System Implementation

Category: Cross-Boundary Collaborations and Partnerships

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Executive Summary

Ohio is the seventh largest state in the United States, operating with a biennial budget of $96.8 billion and serving more than 11.5 million citizens. In Ohio, administration of health and human services is spread across state and local county organizations and counties have significant autonomy in the way services are delivered to their consumers. As in many other states, Ohio faces various challenges across a changing health and human services landscape that reinforces the need to increase program efficiency, and work collaboratively across state and local agencies to deliver critical services to customers.

To address these challenges, the Governor's Office of Health Transformation (OHT) initiated a modernization project in 2013 to simplify state and local responsibility for eligibility determination, starting with updating its legacy eligibility systems. Throughout the Ohio Benefits technology project, the state has successfully utilized boundary-breaking approaches that develop partnerships among multiple state agency partners and encourage cross-county collaboration to improve services and increase program efficiency.

The following four initiatives exemplify successful cross-boundary collaborations and partnerships that have shown significant benefit to state, county, and client stakeholders.

- **Continuum of Care for Released Offenders –** In a joint venture, the Ohio Department of Rehabilitation and Corrections (DRC) and the Ohio Department of Medicaid (ODM) leveraged new eligibility system automation to help offenders apply for medical coverage prior to their release from a correctional institution. The goal of this initiative is improved health outcomes for this population and ultimately a reduction in the recidivism rate.
- **Partnership to Link Veterans Healthcare Services –** OHT, ODM, and the Ohio Department of Veterans Services (ODVS) simplified the process of identifying veterans applying for Medicaid and Long Term Care Services and directly connecting them to local County Veterans Service Offices (CVSOs) for access to more robust veterans' resources.
- **Cross-County Change Network –** The Ohio Benefits project leadership team established an active network of "Readiness Managers" across 88 independent counties to share best practices, help manage workload challenges, and facilitate a smooth technical and business process transition to approximately 5,100 eligibility workers across the state.
- **Shared Services Collaboration Model –** Ohio's shared services model was established in an effort to introduce business processes that streamline and standardize health and human services delivery. The Ohio model is a client centered system that is responsive to the changing needs of its clients. Common methods, shared workload and an integrated technology platform enable counties to improve operational efficiency and deliver a common client experience.

1. **Description of the Business Problem and Solution**

Business Problem

Ohio operates in a state-supervised, county-administered system to deliver cash, food and medical assistance benefits. Each county has authority to manage these programs independently and the ways in which the programs are administered differ significantly from county to county.

At the outset of the Ohio Benefits project, customers were required to seek services only in the county in which they resided and county organizations were generally not able to share resources across county boundaries. County workers did not have a statewide forum to collaboratively share concerns, ideas, and/or best practices to overcome specific programmatic challenges. Additionally, some Ohio agencies pursued modernization efforts independently, but did not often find opportunities to work together to achieve mutually beneficial goals.

The need for collaboration across county and state organizations to deliver services to customers and the technology to support this collaboration were considered critical to the overall success of the state's modernization project and effort.

Solutions

To address these high-priority concerns, Ohio forged strategic partnerships among multiple state agency partners and county leadership. The focus of these partnerships is the sharing of resources and leveraging of technology to increase program efficiencies and enhance service delivery to customers. The following are specific examples of partnerships that leverage collaboration and technology to improve customer service delivery and highlight the investment the state has made in building partnerships.

Continuum of Care for Released Offenders

In 2014, Ohio's incarceration rate was slightly above the national average, with more than 20,000 individuals being released from DRC facilities every year. A majority of these offenders have chronic behavioral and/or physical illnesses, and do not have any form of health insurance upon their release from prison. In January 2014, DRC and ODM worked together to identify a method of providing continued health services for this population. This partnership was unprecedented in Ohio, and for those with the most serious health problems, it was believed that continual health services would result in reduced recidivism rates.

As a result of the work group's efforts, a plan was formulated to provide inmates the opportunity to apply for Medicaid benefits prior to their release from prison with the goal of an approved application and being on a managed care plan by the prisoner's release date. In September 2014, the initial phase was launched that included a manual application process to accept health coverage applications and their managed care plan

selection from offenders. A schedule to bring on additional facilities and to automate the application process was also defined.

With automation, a file transfer process sends application information to the Ohio Benefits system. Applications are processed through the system's "no-touch" capability using the federal verification hub established to support requirements of the Affordable Care Act. Applications that fall-out of the "no-touch" process are forwarded to state workers to complete. Once offenders are enrolled in Ohio's Medicaid program their managed care selection is shared with providers. Managed care providers are given access to offenders' medical records so upon release offenders may continue to receive targeted care for identified health concerns.

Weekly work group meetings continue to be held with representatives from DRC and ODM to monitor outcomes of this initiative and identify opportunities for improvement.

Partnership to Link Veterans to Healthcare Services

It is estimated that there are over 900,000 veterans that live in Ohio, many of whom are unaware that they may be eligible for potentially more generous veterans' healthcare benefits. In January 2014, OHT, ODM, and ODVS formed a cross-agency work group to identify opportunities to link veterans to these benefits. The outcome was an addition to the Ohio Benefit system's customer self-service portal to collect basic information from residents who are applying for healthcare assistance and who identify themselves or their spouses as serving or having served in the U.S. Military. The applicant's basic information is then electronically referred to ODVS. ODVS reviews the information and shares it with their local CVSO who follows-up directly with the applicant to determine eligibility for veterans' benefits.

The identification and referral functionality for veterans debuted in July 2014. In addition, ODVS has dedicated a full-time veteran with recent combat experience to follow-up on the online portal information and make referrals to appropriate CVSOs.

Cross-County Change Network

The administrative autonomy that counties possess in Ohio presents challenges to the management of large-scale change across technologies and business processes. Ohio Benefits project leadership understood that an approach that preserves county autonomy but also emphasizes opportunities to share best practices across the state was required for a successful statewide implementation. As a result, a cross-county change network was created to support the implementation of the Ohio Benefits system. The change network is comprised of county "Readiness Managers" that includes representation from each of Ohio's 88 counties. The network helped prepare approximately 5,100 county workers to be ready for the initial implementation of the system. The initial phase included eligibility determination for Ohio's MAGI Medicaid population and an interface with the federal healthcare market place.

Readiness Managers were educated on the importance of their role, responsibilities, and expectations. The Ohio Department of Administrative Services (DAS) in conjunction with ODM and the Ohio Department of Job and Family Services (ODJFS) established weekly phone calls and monthly in-person meetings with the network to share information; smaller working groups also met periodically. Organized by county size, these small groups collaborate on best practices and share strategies to use the system effectively.

The network continues to operate in support of major system releases that implement additional functionality, business process, and policy changes. This network also raises awareness of high-priority issues and defects for the state project team's immediate resolution. Two Readiness Managers were recently awarded the 2015 Presidential Award by the Ohio Job and Family Services Directors' Association. This award is bestowed on individuals who provide exemplary services to counties.

County Shared Services Collaboration Model

In an effort to streamline health and human services program delivery, standardize business processes, and improve client outcomes several working groups of county directors and county case workers was formed to foster a collaborative approach for the development of Ohio's County Shared Service model. To begin, county leadership joined together to establish a collective vision and a set of guiding principles to guide the counties and the state through this effort. The program, known collectively as County Shared Services (CSS), and its work groups focused on the development of standards/best practices and streamlining of business process and supporting technology.

Ohio, like many states, has variability in the size of its counties, available resources, population mix, and the technology available to them. This variability resulted in each county developing their own methods to serve their customers. CSS is a key initiative in Ohio's journey. Center to this journey is the commitment from county leadership and the state to implement a shared vision and common business processes.

Several foundational technology solutions are utilized to support the CSS program. These include a centralized enterprise document management system that is tightly integrated with the Ohio Benefits system platform. This single platform for scanning, indexing and viewing documentation provides easier access to client documentation and standardizes the process of capturing and organizing client data. Additionally, a single telephone line with a robust IVR also streamlines client accessibility and reduces wait times for case processing and the distribution of notices. By sharing these services, county offices have experienced faster application processing times and increased productivity from their staff.

Ohio and its counties are committed to the CSS model and will continue to work collaboratively across county lines to streamline case processing and deliver cost-effective, high quality services to all clients. The first virtual "Shared Services Group"

established – Collabor8 – currently handles all call center and case processing needs for the 9 counties participating. Two additional virtual Shared Services Groups are slated to "go live" in the near future.

2. Significance of the Improvements to the Operation of Government

The cross-county partnerships and sister agency collaborations forged as part of Ohio's health services transformation initiative and the Ohio Benefits system implementation has demonstrated innovative ways to address complex health and human services challenges. Collaboration across state agencies and with county leadership and an engaged state workforce was – and continues to be – integral for sustaining success.

The collaboration between DRC and ODM was the first of its kind to cross agency boundaries and is part of the state's mission of extending Medicaid coverage to one of Ohio's most vulnerable populations. By providing a means of connecting offenders with the ability to apply for medical coverage and be on a managed care plan prior to their release from a correctional institution, these individuals were given a meaningful opportunity for improved health outcomes. Most importantly, it also assured that critical health care services to treat chronic behavioral, physical illnesses or addictions were not interrupted upon release. While Ohio's correctional facilities are not mandated to participate in this program, the fact that all 27 institutions committed to participating and will soon undergo training underscores the necessity of this collaboration and importance of these services.

Similarly, to continue to honor those who served and sacrificed for their country, the strategic collaboration between OHT, ODM, and ODVS provided veterans with a streamlined method to access crucial healthcare services for which they might be qualified for but were not currently receiving or aware of. As of February 2015, 3,500+ veterans utilized the online referral service to access VA services. Amazingly, only 27% of those veterans were receiving any VA benefits at the time of referral; however, nearly 83% were eligible for VA benefits.

From a county perspective, the establishment of a strong change network of leaders across 88 independent counties helped ensure a smooth implementation of technological, business process, and policy changes across the state. Specifically, county processes and workload management practices have dramatically improved due to this new forum for sharing best practices and materials, innovative ideas, and communications. While it may have initially been easier for individual counties to create and manage their own business procedures, the CSS collaboration effort demonstrates the significant benefits that synergies provide by sharing resources and simplifying where and how case processing is managed. CSS has been fundamental in setting the standard for business process efficiency in Ohio.

3. Benefits of the Project

Amidst a broader health services transformation, Ohio strategically demonstrated cross-boundary partnerships and inter-agency collaboration to streamline health and human services program implementation and better serve customers. As part of these collaborative efforts, Ohio benefited from:

- Reduction of siloed service delivery
- Improved avenues for customer data sharing and communication across counties and agencies
- Leveraging technology to improve access to care for specific, under-served populations

As part of the DRC and the ODM partnership, correctional facilities and counties were empowered to sustain the delivery of critical health care services to released offenders. In 2014, nearly 22,664 individuals were released from Ohio correctional facilities, and with many potentially benefiting from this initiative. Beginning in September 2014 with the launch of the manual application process, approximately 357 individuals have been processed through this program – this covers the entire female population of released offenders. Automation was introduced in May 2015. The new automated process leverages the federal data hub for verification and requires no action on the part of the counties if "no touch" verification is successful. The DRC process is scalable and transferrable, and could be leveraged in other states, particularly with those with large inmate populations.

As of February 2015, 3,500+ veterans have provided service information via the Ohio Benefits project effort. As part of the joint effort among OHT, ODM, and ODVS referrals have been completed for more than 1,125 veterans, and 550+ veterans have sought long term care facility and waiver services. Those veterans are given highest priority and are referred to a patient advocate in a VA Medical Center for assistance. Again, this program is scalable and can be used a model in other states with significant veterans populations – particularly those requiring additional healthcare services.

Recognizing its value, Ohio continues to utilize its robust change network of cross-county Readiness Managers to support additional system implementations and upgrades. As new programs are added to the system, increased staff involvement means greater awareness of the hot-topic issues within counties. Through this readiness network, state workers are empowered to asked questions and are given the ability to seek assistance amongst their peers to solve problems. In addition, project facilitated networking events provide ongoing opportunities for counties to share best practices and learn from their peers across Ohio.

Finally, the CSS model, utilizing centralized technology and sharing county resources has resulted in improved customer service, efficient application processing and increased staff productivity. As a result, county workers have more time to focus on helping clients and their families realize improved outcomes and self-sustainability.