





# Tech for Success

## **Aligning and Supporting the Workforce with Modern Technology**

**By Laura Haffield and Lauren Hirka**

*An individual who has moved multiple times and is hard to reach for renewals or redeterminations.*

*An elderly client who has had continuous eligibility and doesn't know they're at risk of disenrollment without action.*

*A young family that isn't familiar with typical renewal processes and the right steps to keep their benefits from expiring.*

*A person who is confused by multiple notices and doesn't understand what information they need to submit to each program.*

**A**nywhere you're reading this article, you are likely to have heard similar scenarios where community members are at risk of losing resources because of the unwinding of the COVID-19 public health emergency. For example, the average person will receive \$90 a month less in Supplemental Nutrition Assistance Program (SNAP) benefits, while some households will see a reduction of \$250 or more.<sup>1</sup> Even those who remain eligible are struggling to navigate high inflation and rising food and medical costs. The narrative is clear that millions of individuals are being affected in some way.

In addition to the community impact, consider all the overburdened caseworkers trying to help clients mitigate these exact scenarios while facing the extensive backlog of renewals during unprecedented staffing shortages.

Agencies have been preparing for the unwinding for more than a year now—sending letters, collecting addresses and phone numbers, deploying navigators, and employing other strategies to ensure their constituents know how to continue to access holistic resources to support their well-being. But when you consider the number of people impacted, and the volume of agencies that are stretched for staff and resources to handle this work, it's clear that human capital alone isn't the answer.

## Technology as a Workforce Multiplier

Technology has long been proven to streamline processes, increase efficiency, and empower meaningful work. Today there's an app for everything, and it takes a keen eye to determine the tools that will have the greatest impact and create the most ripple effects across programs and agency outcomes.

When it comes to the unwinding, some key questions are: How can we quickly serve the most people? How do we ensure client information is accurate and complete across multiple systems without manual work and back-and-forth communication? How can we enable our workers to focus on customer service and prioritize high-value tasks that require a human's attention and decision making?

Let's explore how modern technology for collaboration, information exchange, and automation can align and support the workforce to help clients work toward positive change.

### Self-Service Portals

Caseworkers today must be able to serve a broad spectrum of customers with varying levels of comfort or ability to use technology. A



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self-service portal is ideal for those customers who want to interact with the agency electronically and complete applications autonomously. It also helps increase the agency's efficiency when the portal feeds into a document management system that collects and organizes the information in a human services-specific way. An ideal solution makes it as simple as possible for clients to complete an application or redetermination, while decreasing manual steps for workers receiving and approving documentation.

■ **Impact on the workforce:** When multiple programs, providers, clients, and agencies are constantly handing paper forms back and forth, it delays workers' ability to make referrals or link clients to services. The process can take weeks or months, which isn't acceptable when someone needs help now. A portal decreases some of these logistical barriers, so workers can solely focus on getting residents the services and resources they need. Cutting out tedious steps in the process of making documents accessible is especially helpful during times of increased demand and workforce shortages.

■ **Impact on the community:** Clients can complete the entire process of submitting applications, including signing either electronically or with a telephonic signature, or supporting information from anywhere, on their own time, and without agency assistance. Many portals today are advanced enough that they can recognize what information a client has already submitted, which reduces the need for someone to call a worker to ask questions. Consider the family that isn't familiar with renewal processes and how relieved they'll be when the portal can help them understand exactly what they need to submit to maintain access to support resources.

■ **Technology in practice:** Shortly after the start of the pandemic, the state of Minnesota was approached by Code for America to develop and implement a portal to streamline their integrated benefit application process. Once implemented,

they found the portal reduces the time it takes to apply for benefits from 110 minutes to less than 20 minutes.<sup>2</sup> The state took over development and support of the platform in 2022 and has recently added an online option for medical assistance renewal, which further impacts the state's ability to meet the needs of both citizens and county staff. BenefitsCal is another example of a portal that has already helped more than 1.7 million Californians take steps to receive food, cash, or medical assistance.<sup>3</sup>

### Data and Information Exchange

A portal is just one way that documents and information can enter your agency, but think about all the others—mail, fax, telephone, email, or in-person drop-off, to name a few. Without proper technology, it'll require a lot of time, steps, and paper to get all this information to the right people, at the right time. This manual system is like a house of cards that won't stay up through the unwinding.

A modern information system that facilitates communication and interdepartmental data sharing will be more valuable as workers sort through the backlog of extended renewals on top of their already increasing caseloads.

■ **Impact on the workforce:** The ability to extract and exchange data, and combine it in intuitive ways, allows agencies to have the most accurate and up-to-date case and client information so that workers can do their job effectively. When workers don't have to focus their time and energy collecting information that already exists elsewhere, they can put more effort toward answering questions, communicating with clients, and prioritizing customer service.

■ **Impact on the community:** From banking and medical apps to social media and business software, think about how easy it is to maintain your information in the tools you use today. Many clients' current issues stem from assuming human services agencies operate the same way. Like the person earlier who was confused by multiple notices, they

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may not realize they need to provide the same information and documentation to each program. When tools automatically facilitate this anticipated information exchange, it reduces clients' confusion, frustration, and burden to repeat the same steps. There's also greater awareness around their challenges and needs to ensure they're getting the right services at the right time.

■ **Technology in practice:** During the American Public Human Services Association's (APHSA) 2022 Economic Mobility and Well-Being Conference session, Coordinating SNAP & Nutrition Supports: Lessons Learned on Systems Alignment, panelists from several states shared how their SNAP and Special Supplemental Nutrition for Women, Infants, and Children (WIC) programs, which are housed under separate government divisions, are sharing data to start automatic referrals, lessen burdens on caseworkers, and increase families served. This is especially significant considering the share of families who participate in WIC has declined over the last decade, and the program's reach appears to have declined further during the pandemic.<sup>4</sup>

## Automation and Advanced Workflows

Once client and case data have been centralized, the next step is automating the flow of information to make sure each worker and program has what they need.

Process automation and workflows are critical here to handle the redundant and manual tasks currently draining workers' time so they can focus on unlocking more customers' potential. Applying automation to help data flow freely back and forth between programs, and without any added work, is also a significant step in strengthening the entire human services workforce.

■ **Impact on the workforce:** When automation moves transactional processes to the background, workers can use the time they get back to help every individual find holistic resources and supports that empower them to thrive. If the system has been configured to identify the specific forms, verification documents, and other information necessary to determine eligibility for each program, that's another burden taken off workers' shoulders so they can focus on handling their casework instead. All this also supports modern approaches that many agencies are moving toward—think no wrong door, integrated services, or system of care models—to provide a human-centered, universal pathway to agency programs.

■ **Impact on the community:** Workflows and bots that work in real time, including while the agency is closed, can help minimize disruption for clients who previously had to worry about their benefits expiring due to processing delays. It can also help more

transient clients, like the earlier example of someone who has moved multiple times, maintain correct contact information by knocking down silos between disparate systems. For example, imagine if the same bot that finds a change reported to SNAP then could also automatically update the state's Medicaid system.

■ **Technology in practice:** The Ohio Benefits Program Family of Bots, a collaboration between Ohio Department of Administrative Services, Ohio Department of Medicaid, Ohio Department of Job and Family Services, and counties across the state, is a prime example of using automation to alleviate process inefficiencies so workers can refocus their time toward serving citizens. As of September 2021, the bots had collectively reviewed and processed more than 500,000 cases, saving county caseworkers more than five years of working hours.<sup>5</sup>

## Bringing It All Together

Technology clearly isn't just an investment in your agency; it's an investment in the long-term social and economic mobility of your community. You are rising to meet unprecedented demands, while empowering workers to focus on helping your constituents thrive.

The unwinding will impact clients and caseworkers alike, but modern technology for collaboration, information exchange, and automation can help everyone feel more supported and successful. 📌

### Reference Notes

1. <https://www.cbpp.org/research/food-assistance/temporary-pandemic-snap-benefits-will-end-in-remaining-35-states-in-march>
2. <https://codeforamerica.org/programs/social-safety-net/integrated-benefits/>
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