

# **Hi Tech, Lo-Tech, No Tech Policies that Support Simplification**

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# Policy and Procedure Can Be Simpler

- Simpler means, where possible:
  - coordinated rules
  - fewer transactions
  - more efficient for clients and caseworkers
  - proactive steps saving work later
- Big online applications systems changes are not the only route to improved efficiencies

# Suggestions for Keeping it Simple

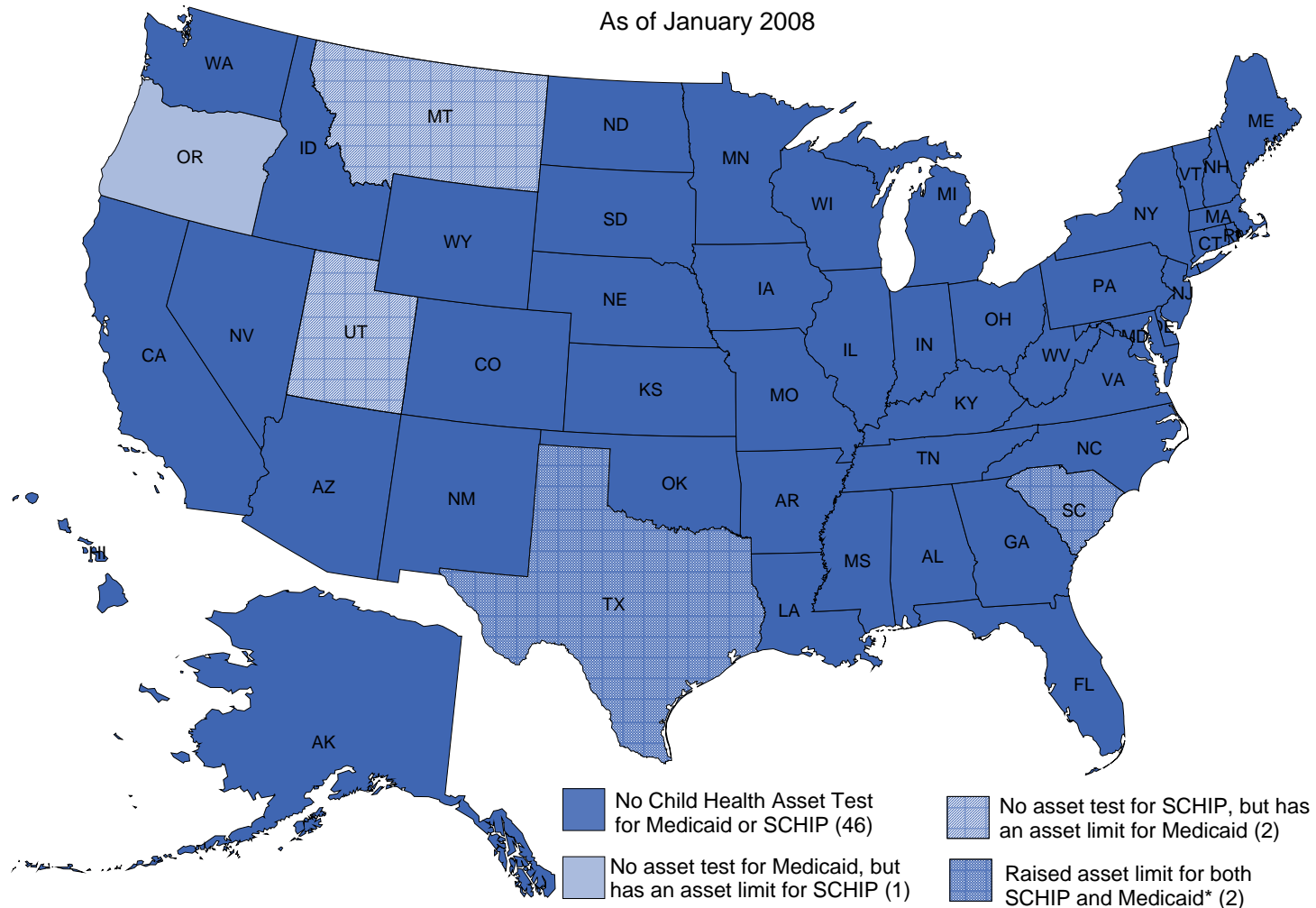
- Simplify eligibility by eliminating asset tests
- Reduce office visits
  - Use longer periods between reviews
  - Use telephone interviews (and signatures)
- Reduce paperwork requirements
  - Simplify reporting requirements
  - Reduce verification
- Use one program to help another

# 1. Simplify Eligibility – Eliminate Asset Tests

- Programs without asset tests are easier to administer and have fewer errors
- States have the flexibility to set asset tests in: TANF, food stamps, Medicaid and SCHIP.
- Many states have eliminated asset tests in some programs but nearly all states have work left to do.

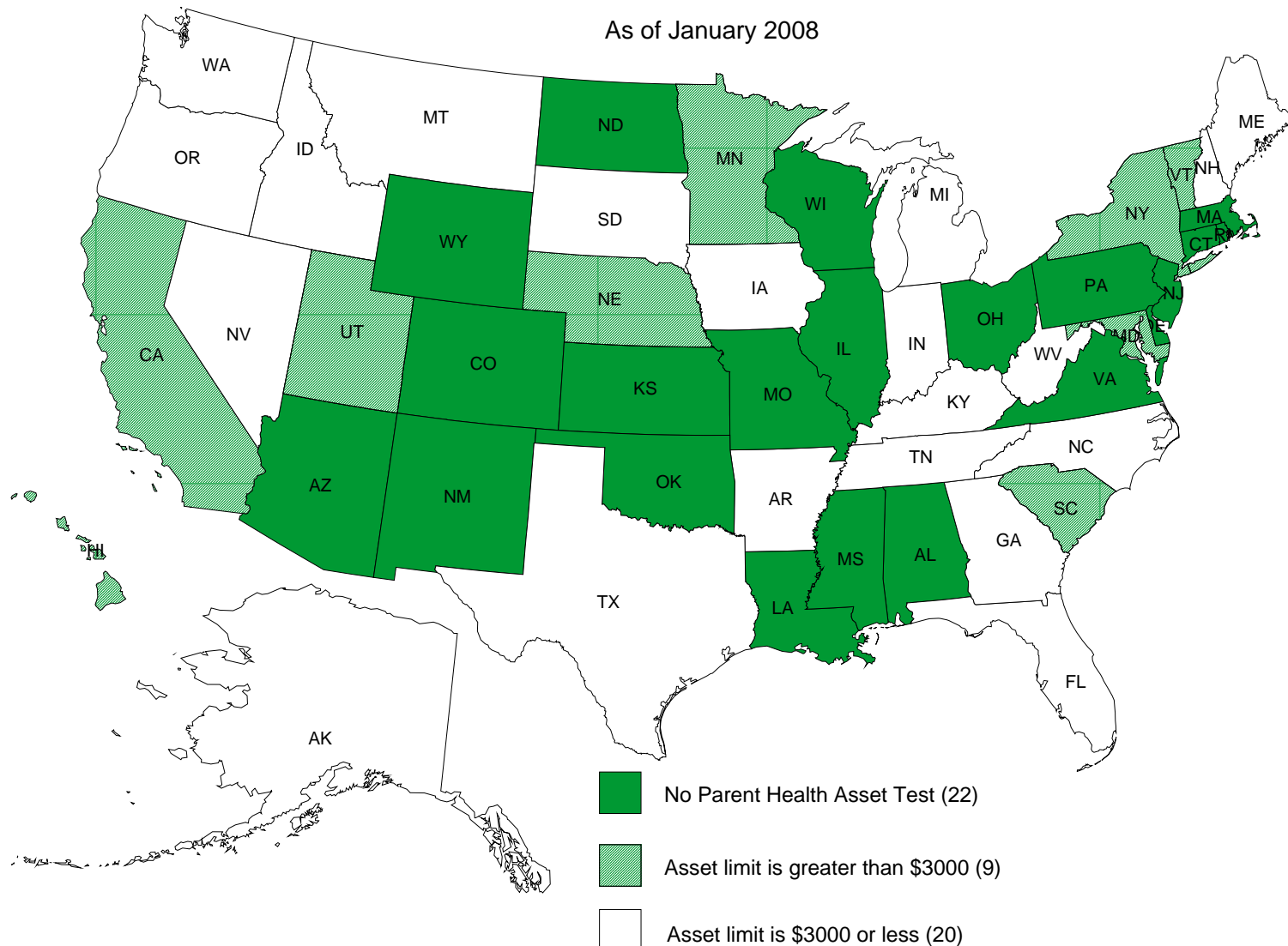
# 50 States and DC Have Expanded Asset Limit Policy for Child Health Coverage

As of January 2008



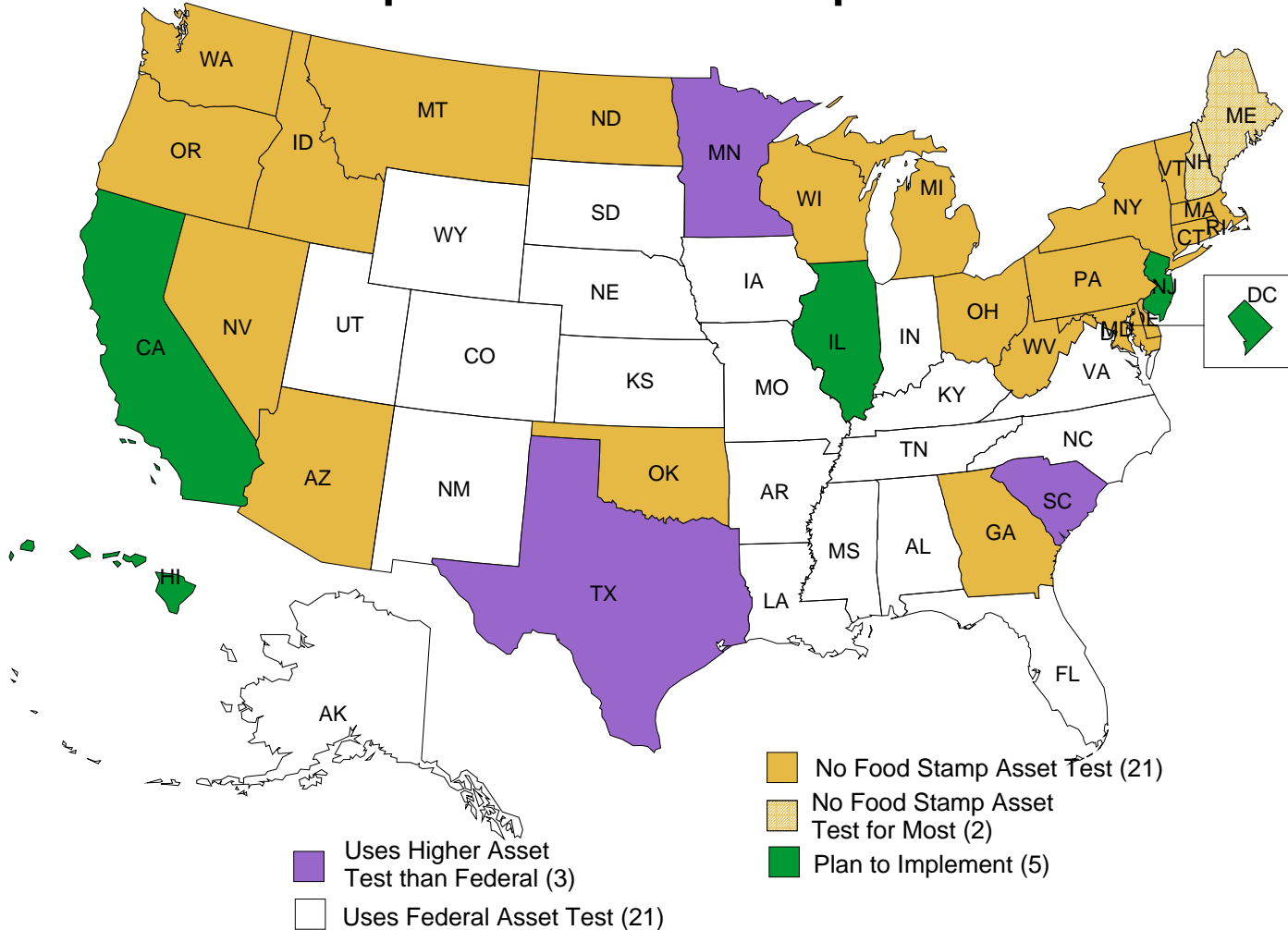
\*Texas has a significantly higher asset limit for SCHIP than for Medicaid

# 26 States Have Expanded Asset Limit Policy for Parent Health Coverage



# 28 States Have Eliminated (or Plan to do so) the Asset Test in SNAP

## State Option For Food Stamp Asset Test



Note: Information based on state agency reports to CBPP.

## 2. Reduce Office Visit Requirements

- Offer telephone interviews (or eliminate where possible)
- Electronic and telephonic signatures.
- Longer and coordinated certification periods.

# Making Use of Telephone Interviews

- Interviews need not be required for some programs (such as Medicaid) and can be conducted by telephone for others (SNAP).
- States can offer telephone interviews for improved efficiency, customer service and to increase access.
- States can use electronic or telephonic signatures
- Signatures not required at renewal
  - Telephonic signatures can be used for food stamps
  - Initial Medicaid application must be signed but not renewal
  - States can choose in child care, TANF, CHIP

# Longer, Aligned Renewals

- Consider 12-month renewals all benefits received by most families
  - Most states could have less frequent reviews for some programs and some groups of recipients
  - Is your process client-friendly and administratively efficient?
- Coordinate renewals across benefit programs
  - Synchronize, even if some are every 6 months and others at 12 months

# 3. Reducing Paperwork

- Assessing Verification – does the state really need it? (and do they need to keep asking for it)
- Rationalizing Reporting Requirements – would your states reporting requirements make sense to you?

# Verification: Eliminate Unnecessary Requests

- Reduce the number of eligibility factors that must be verified
- At reviews, no need to ask for re-verification of information that has not changed (or has not changed significantly)
- Document imaging can reduce repeated verification request.
- Make it easier to satisfy verification requirements

# Assessing Reporting Requirements

- Does the totality of your reporting rules make sense to a family on multiple programs?
- Despite 6-month reporting in food stamps, are families being told to report “all” change in other programs?
- Do clients need to report the same changes to different places at different times?
- Is the state asking recipients to report more information about changes than it needs to know, or wants to know?

## 4. Using One Program to Help Another

- Cross program outreach and screening
  - Many households enroll in one program, but not another.
  - Avoid the problem — ask households applying for one program if they'd like to apply for another.
- Cross program data to improve retention.
  - Can automatically renew Medicaid based on regularly reported food stamp information

# Conclusion

- Simplifying policies & procedures can be a win-win approach.
- Nearly every states has opportunities for simplification that are not yet taken
  - Often more room available than acknowledged
  - Can reduce administrative work for state; cost savings
  - Reduce hassles for clients and improve access

# Bonus slides:

## Tips on Modernization Initiatives

- “Modernization” is a tool, not a salvation for poorly run or under resourced systems.
- Take it slow. Pre-testing, phased roll-outs, do not cut staff before system is working.
- Technology-based enrollment is not an option for everyone, especially when it isn’t designed for everyone.
  - Does it incorporate assistive technology?
  - Is there another route for clients?

# Tips on Modernization Initiatives (cont.)

- Online applications should be publicly available on internet and should include all major benefit programs.
- Pay attention to what happens after user presses “submit.”
  - Is the back-end process in place?
- Monitor, track, evaluate, identify problems and correct