



RECOMMENDATIONS FOR INDIANA'S PUBLIC ASSISTANCE BENEFITS ELIGIBILITY DETERMINATION PROCESS

THE GOAL: A SYSTEM THAT WORKS – As policy makers consider ways to improve Indiana's eligibility system, Indiana Coalition of Human Services (ICHS) believes that everyone can agree on the desired outcome: a system that allows all individuals to apply for, maintain and sustain benefits for which they are eligible in a fair, fully accessible and efficient fashion.

ICHS represents a broad coalition of 20 human service organizations from across the state. ICHS developed a set of principle-based, solution-oriented recommendations for Indiana's Public Assistance Benefits Eligibility Determination Process, which are abbreviated here and summarized on the next page.

- **ACCESSIBILITY** - The system should include multiple ways to access benefits, including face-to-face, telephone, fax and internet, with the objective of securing benefits with the fewest number of contacts and with full accessibility for persons with disabilities.
- **TRAINING** – All staff that provides any part of the eligibility benefit system should have adequate periodic training that covers all functions for which they are processing.
- **ADVISORY GROUP AND POLICY REVIEW** – An Advisory Group should be created to help FSSA and State policymakers to develop transition plans and provide on-going recommendations regarding income eligibility programs. A sub-group should review policies and procedures.
- **BUSINESS PROCESS ANALYSIS AND AUDIT**– Indiana would be best served by a disinterested third party conducting a business process analysis and helping to develop the transition plan to the system that works. An audit should be conducted to determine actual costs and realized savings.
- **DELIVERABLES AND REPORTING** – The revised system should have identified deliverables which are measurable, tracked and reported on a regular basis. These reports should be accessible to the public.
- **COMMUNITY PARTNERSHIPS** – Community partnerships are critical to an eligibility system that works. The V-CAN system and other relationships should be reviewed and evaluated.



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ACCESSIBILITY - The system should include multiple ways to access benefits, including face-to-face, telephone, fax and internet, with the objective of securing benefits with the fewest number of contacts.

- Every potential applicant or recipient to FSSA eligibility services should have the *option of direct access to a trained person who is accountable and has the authority to make an eligibility determination.*
- Full accessibility, including access to assistive technology, must be available for people with special needs.
- The consumer should be able to have the issue resolved in a single transaction unless additional documentation is required.

TRAINING – All staff that provides any part of the eligibility benefit system should have adequate periodic training.

- Special training should be provided to staff specific to all the functions for which they are processing.
- For example, workers who manage a Temporary Assistance for Needy Families (TANF) application need to be able to inform the consumer about the implications of the time-limited TANF.

ADVISORY GROUP AND POLICY REVIEW – An Advisory Group should be created to help FSSA and State policymakers to develop transition plans and provide on-going recommendations regarding income eligibility programs.

- The Advisory Group should encompass a full range various stakeholders, including consumers, legislators, related state agencies and community-based service providers.
- The Advisory Group should be provided access to appropriate data, reporting and internal processes in order to provide informed guidance.
- The Advisory Group should be regularly informed of any actions that are implemented as a result of Advisory Group recommendations.
- The Advisory Group should create a sub-group of outside, technical experts to review policies and procedures about applications, redeterminations and the inter-relationships with other benefit programs. For example, this group should explore categorical redeterminations and presumptive eligibility.

BUSINESS PROCESS ANALYSIS AND AUDIT– Indiana would be best served by a disinterested third party conducting a business process analysis and helping to develop the transition plan to the system that works. An audit should be conducted to determine actual costs and realized savings.

- A business process analysis should be conducted immediately by a disinterested third party. The analysis should include recommendations about benefit processing and document management for inclusion in a transition plan.
- A review of document management should include assessment of who has access to information, what information is needed and how the information is collected, compiled, stored and utilized.
- The third party analysis should be secured and contracted by Legislative Services Agency or by the State Budget Committee.
- The audit, managed by the State Board of Accounts, should determine actual costs and realized savings, including costs absorbed by different function areas and V-CAN members.

DELIVERABLES AND REPORTING – The revised system should have identified deliverables which are measurable, tracked and reported on a regular basis. These reports should be accessible to the public.

- Standardized methods of reporting regular process and outcome data should include both quantitative and qualitative data. In addition to application, denial, enrollment and error information, metrics might involve timeliness and disposition of issue resolution, number of contacts to complete a transaction, client stability, etc.
- Customer satisfaction should be tracked, monitored and reported regularly for comparison and to make future improvements. Clients, caregivers and community partner organizations should be included in surveys.

COMMUNITY PARTNERSHIPS – Community partnerships are critical to an eligibility system that works.

- Service providers need ongoing access to trained eligibility staff and a back door to troubleshoot specific cases.
- The V-CAN system should be reviewed and evaluated, including an accounting of the resources being used from other sources.
- Costs for eligibility processing should not be shifted to other programs or community partners without formal contracts and reasonable compensation.