Integrating Social Safety Net Benefits

Options for State and County Agencies Informed by Recent Integration Successes

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Project Credits

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This guide is part of a larger initiative by the **Beeck Center for Social Impact + Innovation** at Georgetown University to document innovations in social safety net benefits delivery that are driven by human-centered service design, data-informed practices, and responsive technology, with a goal of spreading proven practices more widely.

To discuss anything in this guide further, feel free to reach out to us at **beeckcenter@georgetown.edu**.

Introduction

> "Right now, policymakers in Washington are [enacting] immensely important advances and supports for families.... As powerful as these gigantic policy changes are, they will succeed or fail because of little things, because of [benefit] applications that people understand and can finish or can't, because of government employees who can process those applications efficiently, or can't, because of technology that enables success or doesn't. If we can make our systems as simple and easy as possible for both caseworkers and residents, not only can we cut poverty and create opportunity, but we will treat human beings with the respect and dignity that they deserve."
> *Robert Gordon, Senior Counselor, Center on Budget and Policy Priorities, former director of the Michigan Department of Health and Human Services.*[1]
>
> "[E]ach [benefit] program is trying to keep their head above water, with endless changes in response to COVID, to policy, operations, their program, and it's really hard to take that step back and think, 'How can I coordinate with other programs?'"
> *Jennifer Wagner, Director of Medicaid Eligibility and Enrollment, Center on Budget and Policy Priorities.*[2]

If you work in government and administer social safety net programs like the Supplemental Nutrition Assistance Program (SNAP), Medicaid, the Special Supplemental Program for Women, Infants, and Children (WIC), Temporary Assistance for Needy Families (TANF), or other housing, childcare, and emergency relief programs, you've likely heard of the significant advantages that come from integrating benefits, both for the residents who are eligible for benefit programs and for government agencies. However, the process of integrating benefits can seem daunting—it can require the cooperation of multiple state and county agencies, deliberation over policy questions and data sharing, the capacity of government IT staff and technology vendors, and backing from government leadership. It may also be confusing, because "integrated benefits" is an umbrella term that encompasses a range of changes, from combining benefit applications to linking client data across programs, among many others.

That said, **integrating benefits does not need to be daunting.** There are approaches that can be taken incrementally that can measurably ease burdens for residents and caseworkers. Even successful, large-scale efforts to integrate benefits can be implemented gradually in pilots and prototypes that involve a small number of benefit clients and caseworkers before expanding to the broader population.[i]

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i   Many pilots or prototypes begin at the program or agency level, and after showing success, expand to other benefit programs. Though levels of cross-program and cross-agency coordination vary state to state, it's ideal if programs and agencies can coordinate early as pilots are planned so the capacity for future benefit integration can be built into pilots or prototypes.

The purpose of this guide is to illustrate, as simply as possible, different approaches to integrating benefits that may be feasible in your state or county, while offering examples of how other places are implementing them. Many of these approaches are also being used to drive improvements within programs. These examples and accompanying resources are meant to spark readers' thinking about ways to integrate and improve benefit delivery in their jurisdictions, and direct readers to people at the government agencies and organizations that have preceded them.

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Approaches to Integrating Benefits Explored in This Guide

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Much of the content in this guide sprang from a 2021 workshop[3] featuring government employees who were instrumental in their state's integrated benefits efforts. The workshop, which was part of a series on the historic funding opportunities in the 2021 American Rescue Plan Act (ARPA), showcased different approaches to invest in infrastructure, human capital, and projects that integrate benefit applications, outreach, renewal, and service delivery.

Substantial ARPA funds are designated for state, local, tribal, and territorial governments to modernize and improve the experience of applying for and receiving benefits.[4] States have also gotten policy guidance from federal agencies to invest designated ARPA funds toward SNAP and WIC program modernization, outreach, and innovation[ii] ($1.135 billion available nationally for SNAP and $390 million available nationally for WIC).[4,5,6,7] This guide includes efforts that the workshop presenters highlighted (with their permission), so readers can let their peers in government inform their own agencies' decisions about how to invest.

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ii   Coronavirus State and Local Fiscal Recovery Funds may be used "…to improve efficacy of programs addressing negative economic impacts, including through use of data analysis, targeted consumer outreach, improvements to data or technology infrastructure, and impact evaluations."

This guide also draws from well-documented accounts of integrated benefits work in Louisiana, Michigan, Minnesota, Missouri, and Vermont, done in collaboration with Civilla, Code for America, and Nava PBC. Staff at those organizations, as well as Tara Dawson McGuiness and Hana Schank of New America, wrote the case studies referenced in this guide. The resource links included here provide rich retellings of these states' efforts to learn what barriers they faced, how they overcame them, and how effective their changes have been. This guide also includes links to resources from the Center on Budget and Policy Priorities, Alluma,[iii] and Benefits Data Trust, all of which translate policy and research into actionable references to use when integrating benefits.

The work featured here is not an exhaustive list of integrated benefits activities happening in the United States, but highlights accomplishments and trends. If you're interested in sharing other work on integrated benefits, please email beeckcenter@georgetown.edu.

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iii   Several of the documents from Alluma that are featured in this guide were produced under the organization's previous name, Social Interest Solutions.

1. Take Incremental Steps Toward Integrated Benefits

> "There are a lot of incremental steps that we can take, and a lot of variation by state.… [E]ven if some doors are closed to you because of politics, state silos, eligibility systems, vendors, whatever, keep fighting—there are a lot of different avenues forward. I encourage you to think broadly about integration and find those little avenues in the state. Small changes can make a huge difference."
> *Jennifer Wagner, Director of Medicaid Eligibility and Enrollment, Center on Budget and Policy Priorities.[2]*
>
> "By starting small and working in iterative steps throughout Vermont's benefits forms, the state was able to tackle what otherwise could have felt like a very overwhelming, daunting, and expensive project. But running a tiny 12-week pilot with a form, a [document] uploader, and fifty people on the phone outside of a mining town felt doable."
> *Tara Dawson McGuinness and Hana Schank, on a pilot the State of Vermont ran in partnership with Nava PBC.[8]*

APPROACH

In many states and counties, it can be challenging to get the stakeholder backing, policy and regulatory green lights, technical flexibility, and data linkages needed to proceed with large-scale benefit integration all at once. This is why many successful integrated benefits efforts have started incrementally. By first taking on one or more of the approaches described in this guide on a small scale, you can make progress while also reducing risk, allowing for course corrections, showing impact, and building buy-in for future steps.

PRECEDENTS AND POSSIBILITIES

Rolling Out an Integrated Application in Stages

Minnesota's recent statewide rollout of its online integrated benefit application website, **MNbenefits.mn.gov**, started as a pilot in 2020 with **Code for America** in just two counties (including Hennepin County, where Minneapolis is located). The pilot later expanded to four counties, then 16 counties and one tribal nation, and finally expanded to all 87 counties and three tribal nations over the span of 12 months. Another notable aspect of Minnesota's incremental approach was to use a website with a dot org URL (**MNbenefits.org**) during the pilot. Then the state IT team worked alongside Code for America engineers to transfer the website to an official dot gov URL (**MNbenefits.mn.gov**) in October 2021.[9]

> **READ MORE ABOUT INCREMENTAL STEPS IN MINNESOTA**
> **Four Lessons from Our Journey to Deliver Human-Centered Integrated Benefits.**
> By Dustin Palmer, Code for America.[10]
>
> **Moving Child Care Assistance Applications Online Means More Families Get the Help They Deserve.** By Elana Gravitz, Dustin Palmer, and Eric Giannella, Code for America.[11]

Piloting a Document Uploader With One Office's Caseworkers and Clients Before Broader Adoption

State agency leaders in Vermont approved a small-scale pilot with **Nava PBC** that allowed SNAP applicants to use their phones or computers to upload documents that verify their benefit eligibility, instead of needing to send documents through postal mail or drive to drop them off at one of 12 Economic Services Division Offices. When the online document uploader was piloted in just one of these offices, it cut applicants' wait times for benefit determination by 44 percent. This led the Vermont legislature to approve the budget needed to roll out of the SNAP document uploader statewide. The secure, online document uploader **is now used with other Vermont benefit programs**, letting applicants upload the verification paperwork required for SNAP, TANF, energy assistance, and more, across 37 different benefit programs.[8,12,13]

> **READ MORE ABOUT INCREMENTAL STEPS IN VERMONT**
> **Power to the Public: The Promise of Public Interest Technology. Chapter 2: Design, Data, and Delivery.** By Tara Dawson McGuinness and Hana Schank, New America.[8]
>
> **Integrating Eligibility and Enrollment, One Piece of Software at a Time.** By Domenic Fichera, Nava PBC.[12]

Expanding a Successful Texting Pilot During the COVID-19 Pandemic

The Louisiana Department of Children and Family Services met the urgency and increased demand for benefits sparked by the COVID-19 pandemic by expanding a pilot that sent text message reminders to SNAP applicants and clients to its full SNAP caseload. When the pilot (a collaboration with **Code for America**) started the previous year, it served approximately 1,000 SNAP clients; expanding it statewide meant it now reaches more than 400,000 households. The state has since expanded the text messaging program to include TANF benefit reminders as well.[9]

> **READ MORE ABOUT INCREMENTAL STEPS IN LOUISIANA**
> **How Louisiana Rapidly Scaled Pilot Solutions to Combat COVID-19.** By Dustin Palmer, Code for America.[14]

Understanding Current Problems and Opportunities to Inform Priority Setting

In 2020, before the Missouri Department of Social Services began a human-centered redesign and integration of its SNAP, Medicaid, TANF, and childcare applications in partnership with **Civilla**, the two organizations invested in a period of discovery research. By spending more than 250 hours in interviews with benefit applicants and staff and surveying more than 1,000 staff statewide, the team was able to prioritize which changes would address users' most pressing needs.[15]

> **READ MORE ABOUT INCREMENTAL STEPS IN MISSOURI**
> **Missouri Benefits Enrollment Transformation: Transforming the Enrollment Process for End Users.** By Civilla, the Missouri Department of Social Services, and the Missouri Foundation for Health.[15]

> **OTHER RESOURCES TO LEARN MORE ABOUT INCREMENTAL STEPS**
> **Preparing for Human-Centered Redesign: A Readiness Guide for State and Local Public Benefits Agencies Looking to Improve Applications, Renewals, and Correspondence.** By Katie Sullivan and Sara Soka, Beeck Center for Social Impact + Innovation, and Lena Selzer, Gabriela Dorantes, and Kristen Uroda, Civilla.[16]
>
> **Accessible Benefits Information: Reducing Administrative Burden and Improving Equitable Access through Clear Communication About Safety Net Benefits.** By Ariel Kennan, Sara Soka, and Katie Sullivan, Beeck Center for Social Impact + Innovation.[17]

2. Build and Fund Staff Capacity in Your Government Agency to Integrate Benefits

"With MNbenefits, we aim to reshape the status quo in a way that will far outlive our engagement. From the beginning, we sought a government partner with an appetite and commitment to learning and building with us—one who would ultimately own the service delivery.… We believe this is a blueprint for rebuilding capacity within government digital service delivery teams, rather than the continued trend of outsourcing core services to external contractors."
Dustin Palmer, Associate Program Director for Integrated Benefits, Code for America.[10]

"We are working towards a smooth transition and handoff to our IT departments, and creating a more agile, iterative improvement process as we go. We're continuing this great work, and [this integrated benefits partnership] is building our capacity in Minnesota to be able to do that…[The American Rescue Plan] lets Minnesota bring resources to bear in supporting a digital services team to own after Code for America leaves, so we can continue this way of working and we can continue this level of improvement, at this robust speed, which we have never, ever been able to do in the past."
Jovon Perry, Director of Economic Assistance and Employment Supports, Children and Family Services, Minnesota Department of Human Services.[18]

APPROACH

Government agencies can begin and sustain efforts to integrate benefits by investing in the skills of their current staff and by hiring people who bring particular skills and experience. Key skills to grow, recruit, and socialize include **Agile methodology**[19] and **human-centered design**.[20] Government agencies can also create or assign staff roles that manage and coordinate integrated benefits efforts (which can include partnering closely with and overseeing the work of vendors[21]) and enable collaborations across agencies and divisions.

PRECEDENTS AND POSSIBILITIES

Empowering Government Employees to Sustain Changes Long Term

When Minnesota's Department of Human Services partnered with **Code for America** to create an online, integrated benefits application, they intentionally designed the process to build government staff experience with Agile methodology. The state IT staff used their experience with Minnesota's legacy systems as they worked with Code for America engineers to build the updated, integrated application. Together, they adopted Agile processes like daily standups, iteration planning meetings, and team retrospectives, and co-created a handoff plan that will allow state employees to sustain the application long term.[10]

> **READ MORE ABOUT CAPACITY BUILDING IN MINNESOTA**
> **Four Lessons from Our Journey to Deliver Human-Centered Integrated Benefits.** By Dustin Palmer, Code for America.[10]

Building Government's Agile and Human-Centered Design Capacity

In Vermont, the process of piloting and deploying a secure, online document uploader for SNAP verification, then expanding the tool's use across 37 benefit programs, led to a "radically different" way of approaching change at their state agency. "Our focus working with **Nava PBC** has been to build up our own user-centered design capacity, our [Agile] process, and successful adoption of these technologies," said Cassandra Madison, former deputy commissioner of the Vermont Department of Health Access.[12]

Nava PBC's collaboration with the State of Vermont highlighted two other practices that build government staff capacity to improve benefit delivery and integrate benefit programs. The first is identifying who can internally champion pilots and changes to benefit delivery (such as the supervisor at the Economic Service Division Office who supported the document uploader pilot), and supporting their efforts with funding, time, and leeway. Staff in these roles can promote and socialize human-centered design and Agile methodology among their colleagues in government. The second is to designate a product owner among government staff to coordinate and ultimately be responsible for the change process.[8,21,22]

> **READ MORE ABOUT CAPACITY BUILDING IN VERMONT**
>
> **Integrating Eligibility and Enrollment, One Piece of Software at a Time**. By Domenic Fichera, Nava PBC.[12]
>
> **Power to the Public: The Promise of Public Interest Technology. Chapter 2: Design, Data, and Delivery.** By Tara Dawson McGuinness and Hana Schank, New America.[8]

Funding Dedicated In-House Positions

In 2020, the Michigan Department of Health and Human Services created the new role of cross enrollment coordinator. This position is dedicated to finding ways to connect clients enrolled in one or more benefit programs—like SNAP, Medicaid, or WIC—with other benefits that have similar eligibility standards. Michigan's benefit program directors are excited to collaborate on cross enrollment because of the efficiencies that it creates, and having a dedicated coordinator enables staff-wide exploration and implementation.[23] (See Approach #8 for more about cross enrollment.)

> **OTHER RESOURCES TO LEARN MORE ABOUT CAPACITY BUILDING**
>
> Should This Role Be In-House, or Outsourced? By Mark Lerner, Harvard Kennedy School.[24]
>
> De-Risking Guide: State Software Budgeting > Budgeting and Overseeing Tech Projects > Hire In-House. By Robin Carnahan, Randy Hart, and Waldo Jaquith, 18F.[21]
>
> [Online Courses] Practica: Human-Centered Research and Design; Guidance on Redesigning Applications, Renewals, and Correspondence. By Civilla.[20]

3. Integrate Benefit Applications Using Human-Centered Design

"After filling out the new application, I feel like I can breathe again. The old application would have taken me a whole day. This one was more understandable and less stressful—it asks you the questions but with respect."
Michigan resident, on the integrated benefit application redesign by Michigan's Department of Health and Human Services and Civilla.[25]

"It's refreshing for [residents] to see something come from governments, from some of these public assistance programs, that's so easy and user-friendly and so well thought-out in terms of what their experience is. That really builds trust with the residents from the beginning of their experience and helps us try to continue to build on that trust, rather than starting off at a point of frustration."
Kate Heffernan Carson, Senior Department Administrator, Hennepin County, Minnesota.[26]

APPROACH

Applications for benefit programs are often lengthy, duplicative, and written in a way that is driven by policy and legal directives rather than the need for comprehensibility. Several states have made strides to change this by partnering with organizations with expertise in **human-centered design**.[iv] The resulting applications are shorter, use language that's clear and actionable for readers, and have visual cues that highlight critical information. Additionally, combining multiple redesigned benefit applications into one removes redundant questions and raises residents' awareness of benefits they may be eligible for but don't yet know about. These improved, combined applications save applicants time, reduce the errors and missing information that caseworkers have to address, and create a less stressful, more dignified experience for residents who need support.[25]

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iv   Human-centered design describes the process of learning about users' lived experiences, needs, and wants through immersive research, then applying those learnings to create a different, better experience. Typically the new experience is created incrementally in pieces (as prototypes or pilots) and shared with the residents who would use it for their testing and feedback, then modified so the final experience is likely to address their needs.

PRECEDENTS AND POSSIBILITIES

Shortening and Integrating Applications Using Human-Centered and Accessible Design Practices

The Michigan Department of Health and Human Services worked with [Civilla](#) to redesign and integrate the applications for five types of benefit programs (Medicaid, SNAP, TANF and other cash assistance programs, childcare, and other emergency relief programs including utility assistance). After extensive interviews with applicants and caseworkers, workflow observations, and policy, legal, and content reviews, the team reduced the length of the combined applications from more than 40 pages and 1,000 questions to a shorter, core application with supplemental pages for each benefit program, plus an information booklet that held additional explanations or required legal language that may be difficult to understand. The new application is 80 percent shorter and can be processed in nearly half the time. After research and pilot phases, the redesigned application rolled out statewide in 2018, making it one of the first benefit applications in the United States that prioritizes the experience of applicants and caseworkers.[25]

READ MORE ABOUT HUMAN-CENTERED DESIGN IN MICHIGAN

[Project Re:Form: Removing Barriers to Benefits by Transforming the Longest Assistance Application in America.](#) By Civilla.[25]

[Form MDHHS-1171: Assistance Application and Program Supplements.](#) By the Michigan Department of Health & Human Services and Civilla.[27]

[Power to the Public: The Promise of Public Interest Technology. Chapter 2: Design, Data, and Delivery.](#) By Tara Dawson McGuinness and Hana Schank, New America.[8]

The Minnesota Department of Human Services partnered with [Code for America](#) to center applicants' needs when creating a new, streamlined application that combines SNAP, TANF, childcare, housing, and emergency assistance programs. While developing the combined application, the team partnered with many of Minnesota's county benefits offices and tribal nations to understand the needs of applicants and caseworkers. The resulting combined application reduces the average time it takes to apply for benefits from one hour to 12 minutes, and frontline staff consistently rate the experience of processing the new application higher than the previous one.[9,10]

READ MORE ABOUT HUMAN-CENTERED DESIGN IN MINNESOTA

[Four Lessons from Our Journey to Deliver Human-Centered Integrated Benefits.](#) By Dustin Palmer, Code for America.[10]

The Missouri Department of Social Services, inspired by the human-centered redesign that happened in Michigan, is partnering with Civilla to finalize a human-centered redesign and integration of its Medicaid, SNAP, TANF, and childcare applications.[28]

READ MORE ABOUT HUMAN-CENTERED DESIGN IN MISSOURI

[Missouri Benefits Enrollment Transformation: Transforming the Enrollment Process for End Users.](#) By Civilla, the Missouri Department of Social Services, and the Missouri Foundation for Health.[15]

OTHER RESOURCES TO LEARN MORE ABOUT HUMAN-CENTERED DESIGN

[[Online Courses] Practica: Human-Centered Research and Design; Guidance on Redesigning Applications, Renewals, and Correspondence.](#) By Civilla.[20]

[Preparing for Human-Centered Redesign: A Readiness Guide for State and Local Public Benefits Agencies Looking to Improve Applications, Renewals, and Correspondence.](#) By Katie Sullivan and Sara Soka, Beeck Center for Social Impact + Innovation, and Lena Selzer, Gabriela Dorantes, and Kristen Uroda, Civilla.[16]

[Accessible Benefits Information: Reducing Administrative Burden and Improving Equitable Access through Clear Communication About Safety Net Benefits.](#) By Ariel Kennan, Sara Soka, and Katie Sullivan, Beeck Center for Social Impact + Innovation.[17]

4. Make Integrated Benefits Easy to Access Online and on Mobile Phones

> **"Due to the [earlier online application] system's poor design, people didn't feel safe and secure submitting their information online."**
> *Civilla, Online Enrollment case study.[29]*
>
> **"People used to come into the office all the time because they were confused about what was happening with their case. This [new] portal is so much better—it's simple, understandable, fast, and to the point!**
> *Michigan caseworker, on the redesigned online and mobile-friendly benefits portal done in partnership with Civilla.[29]*
>
> **"The bottom line is that users will try to apply for online benefits applications with the device they have at hand. Without mobile first, mobile responsive online benefits applications, user interactions break down and services fail to reach those who need them most."**
> *Dustin Palmer, Associate Program Director for Integrated Benefits, Code for America.[30]*

APPROACH

COVID-19 made the need for online access to government services painfully clear. But the push to put benefit services information online in a way that's designed to work well on mobile phones[v] has been gaining momentum for years.[30,31] Having applications, change reporting, and renewal services available online allows residents to interact with the system at their convenience, rather than forcing them to make calls or office visits during weekdays. Offering services for multiple benefits in the same online location and format makes for greater efficiency.

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v   Many American adults with annual incomes under $30,000 rely heavily on smartphones and need online services designed to be used on them. Of people in this income bracket, 76% own a smartphone, and 27% are considered "smartphone dependent," meaning they have a smartphone but no broadband access at home.

PRECEDENTS AND POSSIBILITIES

Making Online Benefit Websites Work More Effectively

After **Civilla** partnered with the Michigan Department of Health and Human Services (MDHHS) to redesign and integrate five types of benefit applications on paper (see Approach #3),[25] they took the next step by using **Agile methodology**[19] and **human-centered design**[20] to improve Michigan's online benefits portal. The existing legacy system portal caused difficulties, errors, and delays for benefits applicants and caseworkers. It took applicants an average of 45 minutes to complete, often leaving them uncertain about the security and status of the information they submitted and necessitating phone calls and trips to benefit offices for help. Now, the redesigned online portal at **michigan.gov/MIBridges** lets applicants apply for, renew, report changes to, and upload documents for six types of benefit programs. It's also optimized for mobile phones, meaning it's responsive to phones' screen size with short text and large interaction buttons. Overall, this redesign reduced the time it took applicants to fill out the application by 50 percent and, according to caseworkers, lessened residents' confusion about the status of their application.[29]

Before the portal redesign, MDHHS had promising results from a pilot that integrated SNAP and Medicaid applications, developed for mobile phones. This pilot, done in partnership with **Code for America** and **Civilla**, was also developed using human-centered design and Agile methodology. In the nine months it was active in one Michigan County, application approval rates jumped from 53 percent to 71 percent.[32]

READ MORE ABOUT ONLINE AND MOBILE ACCESS IN MICHIGAN

Online Enrollment: Modernizing Online Enrollment for Michigan's Largest Benefit Programs. By Civilla.[29]

Streamlining Access to Public Benefits in Michigan: Designing a User-Centered Digital Enrollment Experience. By Civilla and Code for America.[32]

Optimizing for Mobile Access

Minnesota's new online integrated benefits application portal, **MNbenefits.mn.gov**, was also designed (in partnership with **Code for America**) using the principles of human-centered design and Agile methodology. Like Michigan's application, it's optimized for mobile phone use and lets residents upload documents by taking pictures of them with their phones. The system doesn't require users to create an account to login, which can be a barrier to applying for new and returning applicants who struggle to manage email addresses and passwords. It also includes accessibility features to support clients who use assistive technology (like screenreaders) to apply.[10]

READ MORE ABOUT ONLINE AND MOBILE ACCESS IN MINNESOTA

Four Lessons from Our Journey to Deliver Human-Centered Integrated Benefits. By Dustin Palmer, Code for America.[10]

Moving Child Care Assistance Applications Online Means More Families Get the Help They Deserve. By Elana Gravitz, Dustin Palmer, and Eric Giannella, Code for America.[11]

Texting Benefit Information

Louisiana is one of a growing number of states that uses text messages to reach benefit applicants and recipients on their mobile phones with updates and reminders about benefit application status and renewals. The Louisiana Department of Children and Family Services uses texts to send messages about SNAP and TANF benefits, a program which began as a pilot with Code for America.[14]

READ MORE ABOUT ONLINE AND MOBILE ACCESS IN LOUISIANA

Cell Phones as a Safety Net Lifeline. By Dustin Palmer, Code for America.[33]

How Louisiana Rapidly Scaled Pilot Solutions to Combat COVID-19. By Dustin Palmer, Code for America.[14]

LA'MESSAGE Pilot: Text Reminders in Louisiana. By Code for America.[34]

OTHER RESOURCES TO LEARN MORE ABOUT ONLINE AND MOBILE ACCESS

[Blueprint for a Human-Centered Safety Net: Many Welcoming Doors.](#) By Code for America.[35]

[The Missed Opportunity in Online Benefits Applications: Mobile First.](#) By Dustin Palmer, Code for America.[30]

[Using Text Message Outreach to Reduce SNAP Churn.](#) By Katie Sullivan and Sara Soka, Beeck Center for Social Impact + Innovation, and Keith Barnes, Benefits Data Trust.[36]

5. Build Modular, Reusable, and Flexible Components, Tools, and Formats

"With an integrated approach, instead of painstakingly adding a new [online] feature to each individual program, all nine programs improve simultaneously from upgrades to the status quo…. Future benefits programs will similarly benefit from these features as they are incorporated into [MNbenefits.mn.gov]."
Jovon Perry, Director of Economic Assistance and Employment Supports, Children and Family Services, Minnesota Department of Human Services.[18]

"We built the uploader to solve a common problem across many benefits programs: time wasted while submitting documents by mail or in person. To build it, we used components or patterns that can be reused for other applications: front-end design and components that can be adapted for a range of business needs; back-end code for securely formatting and storing submitted documents; and an automated uploader that reliably makes documents accessible to state staff. So, while the uploader was quickly adopted to meet Vermonters' current needs, the state can continue to reuse and expand upon it to cover more benefits programs and quickly adapt as policies change."
Domenic Fichera, Product Manager, Nava PBC.[12]

APPROACH

There are multiple advantages when teams create an effective code component, software tool, or design format that can be duplicated, modified, and repurposed. First, it allows what's effective to be reproduced for other benefit programs and government services. Second, what's produced can be modified if necessary when policies or other components change. Third, repetition creates familiarity for users and reduces their burden of needing to learn how to use different systems or tools. For these reasons, this practice works well when integrating benefits, in both technological and non-technological instances.

PRECEDENTS AND POSSIBILITIES

Building Online Features for Reuse

While [Nava PBC](#) collaborated with Vermont's Agency of Human Services, they intentionally produced code, tools, and processes that are reusable and flexible. This approach lets the state modify and duplicate these assets across benefit programs with familiar designs and functions. For example, after the successful pilot of Vermont's online and mobile-friendly document uploader for SNAP, the team at Nava PBC worked with the state to cut out an extra process step for caseworkers (by having uploaded documents go directly and securely to the program's existing document management system). As more benefit programs in Vermont adopted the document uploader, the technological capacity to automatically upload submissions to the document management system via API came with it.[8,12]

> **READ MORE ABOUT MODULAR, REUSABLE, AND FLEXIBLE COMPONENTS, TOOLS, AND FORMATS IN VERMONT**
>
> [Power to the Public: The Promise of Public Interest Technology. Chapter 2: Design, Data, and Delivery](#). By Tara Dawson McGuinness and Hana Schank, New America.[8]
>
> [Integrating Eligibility and Enrollment, One Piece of Software at a Time.](#) By Domenic Fichera, Nava PBC.[12]
>
> [Observations from Successful Integrated Eligibility and Enrollment Projects.](#) By Domenic Fichera, Nava PBC.[37]

Connecting New Components to Existing System Infrastructure

As State of Minnesota IT staff worked with [Code for America](#) engineers to build their redesigned, integrated application for multiple benefit programs, the team made modules that connect to the state's existing routing and document storage services. Part of what made this possible was their decision to code the new modules in Java, the state's existing system language, and work through the state's existing enterprise system architecture. Collaborating in this way also allowed the partners to co-create a plan for the State of Minnesota IT staff to sustain the new system architecture and make future modifications when necessary.[10]

> **READ MORE ABOUT MODULAR, REUSABLE, AND FLEXIBLE COMPONENTS, TOOLS, AND FORMATS IN MINNESOTA**
>
> [Four Lessons from Our Journey to Deliver Human-Centered Integrated Benefits.](#) By Dustin

Repurposing Forms that Work

Modular, reusable, and flexible tools don't need to be technical. For instance, during the redesign and integration of Michigan's renewal forms, [Civilla](#) designed a form that addresses one of the consistent pain points for clients: providing the right documents to verify their income, assets, and expenses. Called the "proofs page," it lists in clear, brief language the types of documents that residents could use to meet multiple verification requirements.[38] The Missouri Department of Social Services, which is also partnering with Civilla on benefit redesign, will be using a similarly designed "verifications page" when their new renewal materials roll out in the near future.[15] A tool like the proofs or verification page could also be modified to include in other benefit applications or for other purposes.

READ MORE ABOUT MODULAR, REUSABLE, AND FLEXIBLE COMPONENTS, TOOLS, AND FORMATS IN MICHIGAN AND MISSOURI

[Project Re:New: Developing Simple, Intuitive Benefits Renewals.](#) By Civilla.[38]

[Project Re:New: Designing Simple and Intuitive Renewals for Michigan's Largest Assistance Programs.](#) By Civilla and the Michigan Department of Health & Human Services.[39]

[Missouri Benefits Enrollment Transformation: Transforming the Enrollment Process for End Users.](#) By Civilla, the Missouri Department of Social Services, and the Missouri Foundation for Health.[15]

OTHER RESOURCES TO LEARN MORE ABOUT USING MODULAR, REUSABLE, AND FLEXIBLE COMPONENTS, TOOLS, AND FORMATS

[Repeatable, Sustainable Processes for Building Benefits Systems.](#) By Kelli Ho, Sawyer Hollenshead, and Makaela Stephens, Nava PBC.[40]

6. Integrate Renewals and Correspondence

"I've been shocked at how early the new [renewal] forms came in. They were sent out and next thing I knew they were in my inbox! I swear we normally spend a week of work [each month] just waiting for renewals to come in. Not with these forms."
Michigan Department of Health and Human Services caseworker, on the 2019 integration and redesign of renewal forms by Civilla and Michigan's Department of Health and Human Services.[39]

"A truly valuable text message service would coordinate renewal, reminders, and timely case information across benefits cases (especially across Medicaid and SNAP) to provide holistic support for clients. The next step would be coordinating renewals themselves across agencies with an integrated touchpoint, as other states have done."
Code for America, in their 2019 report, "LA'MESSAGE Pilot: Text Reminders in Louisiana." [34]

APPROACH

In the same way that well-designed integrated benefit applications save time and burden for residents and caseworkers (see Approaches #3 and #4), integrated renewals and correspondence letters created using **human-centered design**[20] are showing similarly promising results. Several states are beginning to integrate their renewals and correspondence across benefits, whether in letters sent by mail, in online service portals, or text messages. Other ways to integrate renewals that could happen with policy change include coordinating renewals across programs (such as "pushing forward" Medicaid eligibility by 12 months in conjunction with a SNAP renewal), and shared renewal verifications across benefit programs (such as providing a paystub as part of SNAP income verification and having that be accessible to Medicaid).[2,41] States that have gotten federal **Fast Track** waivers or utilized the **state plan option** can enroll people in Medicaid or renew their Medicaid coverage based on their enrollment in SNAP (see Approach #7).[42]

PRECEDENTS AND POSSIBILITIES

Lessening the Burden of Benefit Renewals

Following the success of Michigan's integrated and redesigned benefit applications, the Michigan Department of Health and Human Services partnered again with [Civilla](#) to apply the same human-centered design approach to the benefit renewal process. After conducting in-depth user research with clients and caseworkers, the team piloted redesigned forms that made it clearer what actions clients needed to take, by what date, to renew and keep their benefits. The redesign also pre-filled forms with information from the clients' case, and used the same form design across benefits (a core form with supplements that include the questions that are only needed to renew certain benefits, plus a "proofs page" that lists the type of verification documents recipients need to provide). The redesigned forms proved successful in the pilot, increasing on-time renewal submissions from 75 percent to 95 percent—and, important to caseworker workload, spread renewal form submissions throughout the month instead of the usual submissions spike near the deadline. The redesigned forms are now used across the state. Clients can also manage renewals online at the mobile-friendly [michigan.gov/MIBridges](#) site.[38,39]

> **READ MORE ABOUT INTEGRATED RENEWALS AND CORRESPONDENCE IN MICHIGAN**
>
> [Project Re:New: Developing Simple, Intuitive Benefits Renewals.](#) By Civilla.[38]
>
> [Project Re:New: Designing Simple and Intuitive Renewals for Michigan's Largest Assistance Programs.](#) By Civilla and the Michigan Department of Health & Human Services.[39]

Notifying Benefit Clients About Needed Action via Text

After successfully piloting a 2019 text message service with a small number of SNAP, Medicaid, TANF, and WIC clients (in partnership with [Code for America](#)), the Louisiana Department of Children and Family Services expanded its SNAP text message service to reach clients statewide in 2020, in response to COVID-19.[14,34] These text messages, which include benefit renewal reminders, now serve TANF clients as well.[9]

> **READ MORE ABOUT INTEGRATED RENEWALS AND CORRESPONDENCE IN LOUISIANA**
>
> [How Louisiana Rapidly Scaled Pilot Solutions to Combat COVID-19.](#) By Dustin Palmer, Code for America.[14]
>
> [LA'MESSAGE Pilot: Text Reminders in Louisiana.](#) By Code for America.[34]

OTHER RESOURCES TO LEARN MORE ABOUT INTEGRATED RENEWALS AND CORRESPONDENCE

[Online Courses] Practica: Human-Centered Research and Design; Guidance on Redesigning Applications, Renewals, and Correspondence. By Civilla.[20]

Preparing for Human-Centered Redesign: A Readiness Guide for State and Local Public Benefits Agencies Looking to Improve Applications, Renewals, and Correspondence.
By Katie Sullivan and Sara Soka, Beeck Center for Social Impact + Innovation, and Lena Selzer, Gabriela Dorantes, and Kristen Uroda, Civilla.[16]

Accessible Benefits Information: Reducing Administrative Burden and Improving Equitable Access through Clear Communication About Safety Net Benefits. By Ariel Kennan, Sara Soka, and Katie Sullivan, Beeck Center for Social Impact + Innovation.[17]

7. Match and Verify Client Data Using Linkages Across Benefits

"[Benefit] programs have a lot of connections to other programs within federal statute and regulations, and that allows you to take findings from one program and use it for the other…. Some of these are automatic, others are waivers or options, some serve as a finding of income eligibility…. It's a way to think about these connections not only to help the client, which is critically important, but also in a way that can really streamline and simplify things for eligibility staff."
Jennifer Wagner, Director of Medicaid Eligibility and Enrollment, Center on Budget and Policy Priorities.[2]

"I've been with the state for seven years and the kind of collaboration between the health department and social services was something I never would have thought was possible in light of our silos, so I really appreciate all the work on data matching."
Health department official quoted in "Matching Data Across Benefit Programs Can Increase WIC Enrollment," a report by Jess Maneely of Benefits Data Trust and Zoë Neuberger, Center on Budget and Policy Priorities.[43]

APPROACH

Using the allowed data-sharing linkages between benefit programs is a powerful, fundamental step to optimize effectiveness and opportunities when integrating benefits. The resources listed below detail how to use existing regulations and data sharing agreements to transfer client information or eligibility status between SNAP, TANF, Medicaid, WIC, childcare, and other benefit programs. While the steps needed to share data across programs vary by linkage, taking advantage of them can allow clients to become automatically eligible for enrollment or renewal in additional benefits, after having proven eligibility for one.[2,44,45] Linkages also create the capacity to match data and then outreach to residents who are likely eligible to enroll in additional benefit programs. (See Approach #8 for more on cross-enrollment.)

PRECEDENTS AND POSSIBILITIES

Maximize the Opportunities for Improved Access and Delivery from Linked Benefit Data

States can establish cross-program and cross-agency data linkages by first assuring that existing data-sharing initiatives are cataloged and known by interested agency staff, then by establishing data-sharing agreements between programs where opportunities exist to improve client service and reduce burden. The resources below (in particular, the recommendations on pages 22-23 of **Maximizing Linkages: A Policymaker's Guide to Data Sharing**[44] and pages 15-19 of **Matching Data Across Benefit Programs Can Increase WIC Enrollment**[43]) offer guidance. The California Health and Human Services Agency created an online **Data Playbook**[46] to support their stakeholders in following recommendations like these when using their agency's **Open Data Portal**.[47]

RESOURCES TO LEARN MORE ABOUT CLIENT DATA LINKAGES

Maximizing Linkages: A Policymaker's Guide to Data Sharing. By Khaliyl Lane, Alluma (formerly Social Interest Solutions).[44]

Opportunities to Streamline Enrollment Across Public Benefit Programs[48] and **(Interactive Graphic) Linkages Across Public Benefit Programs Offer Opportunities for Streamlining.**[45] By Sonal Ambegaokar, Alluma (formerly Social Interest Solutions), and Zoë Neuberger and Dorothy Rosenbaum, Center on Budget and Policy Priorities.

Using SNAP Data for Medicaid Renewals Can Keep Eligible Beneficiaries Enrolled. By the Center on Budget and Policy Priorities.[41]

How Data Sharing Can Improve Equitable Access to Public Programs. By Alluma.[49]

Fast Track: A Quicker Road to Medicaid Enrollment. By Jessica Maneely, Benefits Data Trust.[50]

Express Lane Eligibility for Medicaid and CHIP Coverage. By the Centers for Medicare & Medicaid Services.[51]

Matching Data Across Benefit Programs Can Increase WIC Enrollment. By Jess Maneely, Benefits Data Trust, and Zoë Neuberger, Center on Budget and Policy Priorities.[43]

Data Playbook: A Department's Toolkit to Using Data. By the California Health and Human Services Agency.[46]

California Health and Human Services Open Data Portal. By the California Health and Human Services Agency.[47]

8. Conduct Outreach for Benefit Cross Enrollment

"[W]e use cross enrollment... to help us reach our goal of connecting people across [benefit] programs and getting them enrolled.... We found that there's at least 150,000 people in our state who are on LIF (Low Income Families) Medicaid but not on SNAP, so we did some outreach to them via text message to ask if they wanted to apply, and we saw a seven-percent boost of people applying."
Steph White, Cross Enrollment Coordinator, Michigan Department of Health and Human Services.[23]

"When executed in a responsible and purposeful way, data-sharing has the ability to maximize efficiencies and address critical social determinants of health using limited resources to target eligible but unenrolled individuals to bolster cross enrollment, or linkages, between social services programs."
Khaliyl Lane, Alluma (formerly Social Interest Solutions).[44]

"When I call [department directors], they're like, 'Okay, let's work together and figure out how we can make it better.' Cross enrollment brings efficiency in the work.... Your [government staff] team has a ton of ideas, I'm sure, and once you start asking, everybody will give you thoughts of how you can begin.... [O]nce the action begins people start getting interested and excited."
Steph White, Cross Enrollment Coordinator, Michigan Department of Health and Human Services.[23]

APPROACH

Cross enrollment is an approach to integrating benefit delivery that leverages the allowable linkages between benefit programs' data to simplify clients' enrollment in other programs, and to target outreach efforts to residents who are likely eligible for a program but not yet enrolled in it.[49] (See Approach #7 for more on benefit data linkages.) There are many approaches to doing cross-enrollment outreach, such as text messaging, mail, phone calls, targeted media campaigns, and providing information when someone interacts with another benefit program on a form or at a benefit assistance center.

PRECEDENTS AND POSSIBILITIES

Breaking Down Benefit Program Silos with Cross-Enrollment Outreach

In 2020, the Michigan Department of Health and Human Services created a cross-enrollment coordinator position. In that role, Steph White has explored and enabled successful cross-enrollment efforts between departments in multiple ways.

- The Department of Health and Human Services used text messages to outreach to residents who weren't enrolled in SNAP, but were adjunctively eligible for it because they enrolled in Medicaid under Michigan's Medicaid expansion.

- The Michigan Department of Labor and Economic Opportunity and Michigan Department of Insurance and Financial Services pooled information to do proactive outreach to residents who had lost health insurance under COVID through direct outreach, media and social media campaigns, and community-based organizations and local health departments funded to support outreach efforts.

- The Michigan Department of Treasury has had a checkbox on their Home Heating Credit application that lets applicants indicate if they want to be notified about other benefit programs they may be eligible for based on the information they provided in the application. Now that the state has directed additional resources toward cross enrollment, outreach to the people who indicated they'd like that information has started.

- The Department of Health and Human Services has also reviewed their data to find residents enrolled in SNAP or Medicaid who have young children or a pregnancy in their household, then sent them text messages explaining how they could apply for WIC.

The cross-enrollment coordinator role helps benefit program directors create efficiencies, and the success of their collective efforts encourages more interest, contributions, and ideas for further collaboration among agency staff.[23]

Matching Program Enrollment Data to Reach Those Likely Eligible for Under-Enrolled Benefit Programs

State health and social service agencies in Colorado, Massachusetts, Montana, and Virginia piloted a successful text outreach program that matched data from SNAP and Medicaid programs across agencies to reach residents who were likely eligible for WIC but weren't currently enrolled. Federal regulations make SNAP and Medicaid enrollees automatically adjunctively eligible (income eligible) for WIC, and allow SNAP and Medicaid programs to share data with the WIC program. (See the resources provided in Approach #7 for more on benefit program data linkage mechanisms.) Data sharing across programs also allowed clients in the pilot to have a less burdensome WIC enrollment process, because caseworkers already had access to clients' verified income, identity, and residence.[43] The agencies partnered with **Benefits Data Trust** and the **Center on Budget and Policy Priorities** to design and evaluate the pilot, and get technical, policy, and legal support.

RESOURCES TO LEARN MORE ABOUT CROSS ENROLLMENT

How Data Sharing Can Improve Equitable Access to Public Programs. By Alluma.[49]

Matching Data Across Benefit Programs Can Increase WIC Enrollment. By Jess Maneely, Benefits Data Trust, and Zoë Neuberger, Center on Budget and Policy Priorities.[43]

Targeted Text Message Outreach Can Increase WIC Enrollment, Pilots Show. By Jess Maneely, Benefits Data Trust, and Zoë Neuberger, Center on Budget and Policy Priorities.[53]

Using Data Matching and Targeted Outreach to Enroll Families with Young Children in WIC: Lessons Learned from State Pilots. By Jess Maneely, Benefits Data Trust, and Zoë Neuberger, Center on Budget and Policy Priorities.[52]

Recommendations to Increase Program Participation by Coordinating Outreach and Enrollment Opportunities. By Suzanne Wikle, The Center for Law and Social Policy (CLASP).[54]

Blueprint for a Human-Centered Safety Net: Many Welcoming Doors. By Code for America.[35]

Using Text Message Outreach to Reduce SNAP Churn. By Katie Sullivan and Sara Soka, Beeck Center for Social Impact + Innovation, and Keith Barnes, Benefits Data Trust.[36]

9. Cross Train Government Staff and Community Assisters on Multiple Benefits

"An action step can be as simple as cross training. Do staff know about the other programs? I was a food stamp caseworker in North Carolina. I knew nothing about Medicaid. I couldn't even tell somebody something as simple as, 'Oh, I think you're eligible, apply.' Or, 'You're definitely not eligible, it's not going to be able to help you.' Something simple to let them know more than just, 'Call 211 ,' or, 'Look on our website.' Give people a little direction to look at the whole person."
Jennifer Wagner, Director of Medicaid Eligibility and Enrollment, Center on Budget and Policy Priorities.[2]

"When it comes to treating the whole person and leveraging the relationships that we have with our clients, the frontline caseworkers are really key to that. They tested and rolled out just one little question that they add to the end of their conversation with clients: 'Is there anything else going on in your life that I might be able to help you with?' Previously if a person called in and said, 'I want to apply for SNAP,' the person just applied for SNAP and that was the end. But in this case we're saying, 'What else is going on?' You might find out, 'Well, my car is broken down, so I can't really get to work.' 'Well, we actually have some funds available to help you repair your car and get you to work.' But we didn't know that in the past. We didn't even ask until now. That's a big part of what we've been doing."
Steph White, Cross Enrollment Coordinator, Michigan Department of Health and Human Services.[23]

APPROACH

Not all approaches to integrating benefits rely heavily on technology or datasets. If caseworkers and community organizations that assist in benefit enrollment have supports in place to encourage them to learn about a range of public benefits, they can assist residents with different, related challenges that they're facing instead of with a single benefit program. Some ways to incentivize cross training include realigning agency goals and metrics to include cross training and referrals to other programs; funding the development of curricula, resources, and cross training delivery; and addressing real or perceived funding restrictions or reporting requirements that lead caseworkers and community organizations to not connect residents to other public benefits.

PRECEDENTS AND POSSIBILITIES

Training Across Benefits, Peer-to-Peer

When the Michigan Department of Health and Human Services worked with [Civilla](#) to design, pilot, and implement a redesigned, integrated renewal form that covered SNAP, Medicaid, cash assistance, and childcare, Civilla also worked with the department to develop and support a peer-to-peer training model. This approach prepared more than 5,000 staff members in more than 100 offices, and more than 3,000 staff from 600 community organizations, to use the multi-benefit renewal forms. They also adapted the training to be remote at the onset of COVID-19.[28,38]

Updating Interview Scripts to Include Other Benefit Referrals

Michigan's SNAP and Medicaid benefit caseworkers have added a new question to the end of the scripts of interviews required as part of the benefit application process. They now ask applicants if there is anything else happening in their life that they might be able to help with. As a result, applicants get referred to benefit programs that they may not have known existed, such as help funding transportation, childcare, or energy bills.[23]

> **READ MORE ABOUT BENEFIT CROSS TRAINING IN MICHIGAN**
>
> [Project Re:New: Developing Simple, Intuitive Benefits Renewals.](#) By Civilla.[38]
>
> [Preparing for Human-Centered Redesign: A Readiness Guide for State and Local Public Benefits Agencies Looking to Improve Applications, Renewals, and Correspondence.](#) By Katie Sullivan and Sara Soka, Beeck Center for Social Impact + Innovation, and Lena Selzer, Gabriela Dorantes, and Kristen Uroda, Civilla.[16]

> **RESOURCES TO LEARN MORE ABOUT BENEFIT CROSS TRAINING**
>
> [Blueprint for a Human-Centered Safety Net: Many Welcoming Doors.](#) By Code for America.[35]

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