

# The Ohio Benefits Program is “BOT” In

The Ohio Benefits Program’s Launch of the Virtual Family of Bots to Support Ohio’s Counties and Citizens

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**STATE:** State of Ohio

**AGENCY:** Ohio Department of Administrative Services

**AWARD CATEGORY:** Emerging & Innovative Technologies

**PROJECT TITLE:** Ohio Benefits Program

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## Executive Summary



While the challenge of managing and supporting Medicaid, Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF) benefits is not unique, the State of Ohio’s **response** to the growing caseloads and overburdened county caseworkers is most definitely innovative. Recognizing the growing challenges counties face in administering public assistance programs, Ohio took an unprecedented approach toward alleviating the burden. The Department of Administrative Services (DAS) and Ohio’s two largest agencies, the Department of Job and Family Services (ODJFS) and the Department of Medicaid (ODM), as well as 88 County Department of Job and Family Services, formed a partnership to collectively design, implement, and maintain an unprecedented approach to human services delivery through the Ohio Benefits Program. Ultimately, the Ohio Benefits Program, and its agency and county partners established not only a virtual workforce, but most importantly, a collaborative partnership to identify, prioritize, design, and implement a “family of automations,” whose sole purpose was to alleviate process inefficiencies for county caseworkers.

This was certainly not an overnight success story. Instead, it was a journey that began with the idea to leverage artificial intelligence (AI) technologies to assist the workforce and enhance the state’s delivery of public assistance programs to the most vulnerable populations across the state. That single idea culminated into the nation’s most robust automation program supporting a state’s public assistance program, a feat that was made possible by the close collaboration between DAS, ODM, ODJFS and the counties. Collectively, the Ohio Benefits Program Family of Bots (Bots) has reviewed and processed over 500,000 cases, saving county caseworkers over **five years of working hours**. This is five years of time that the counties can now use to refocus and prioritize efforts that directly serve their clients – Ohioans in need.

Because these Bots were developed and governed through a partnership with multiple agencies and directly incorporated end-user feedback, the AI solutions can work alongside and complement county staff, caseworkers, and state employees. The Bots successfully transformed and enhanced the user experience for all stakeholders involved. From processing newborn Medicaid eligibility to verifying caseworker actions in a system, the Bots operate in a multitude of ways and demonstrate the power of collaboration, innovative thinking, and a shared and mutual commitment to improving the lives of Ohioans.

The Ohio Benefits Program and its key partners are truly “Bot” in.

## Project Narrative

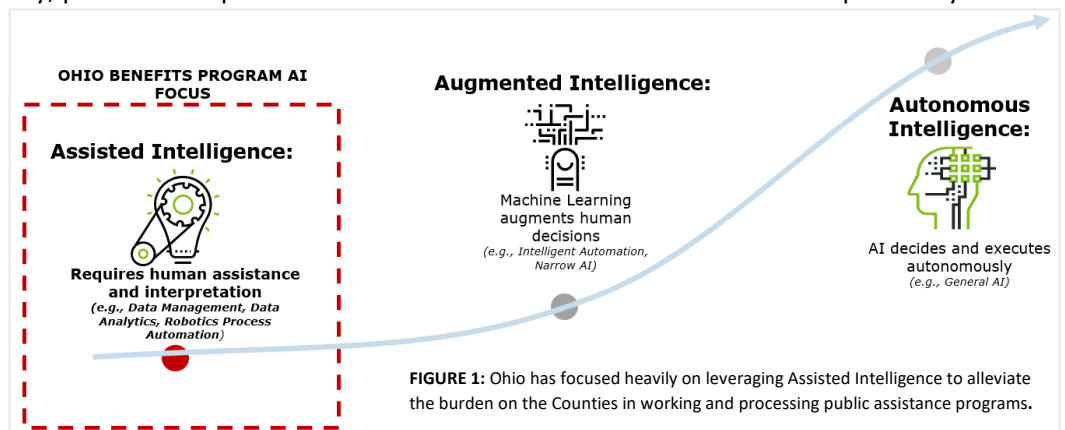
### THE IDEA

The State of Ohio is a state supervised, county administered human services system. While state and federal laws and policies provide certain guidelines, Ohio’s 88 counties manage the execution of human services for a variety of programs, including Medicaid, SNAP, and TANF. It is estimated that Medicaid administers services for over 3 million Ohioans, while ODJFS administers SNAP for approximately 1.5 million individuals. Determining program eligibility and the processing of changes is handled by 88 counties that vary in size, population, demographics, and overall technical understanding. While county caseworkers leverage an integrated eligibility system, known as Ohio Benefits, to process Medicaid, SNAP, and TANF, they have long been burdened by labor-intensive administrative duties, manual data entry, excessive overtime, and limited resources.

DAS and Ohio Benefits Program leadership recognized this challenge and endeavored to bring new thinking to an old problem – enter the use of AI and process automation software to replicate human actions and perform rules-based tasks to assist the county workforce. DAS also recognized that as a county administered state, any technology innovations required a harmony of policy needs and operational realities. While DAS advocated for AI adoption, it recognized that all involved agencies and counties would need to invest in the concept and be committed to onboarding to the new solutions. DAS found true innovation partners, ODM and ODJFS, who led the effort to identify areas where intelligent automation could be brought to life. The counties also joined the coalition and collectively launched what has become the most successful virtual workforce in the nation.

Through this collaboration, Ohio took the use of process automation software that traditionally automated structured, back-office digital processes, a step further. Not only has Robotic Process Automation (RPA) helped county caseworkers regain time that was previously lost to routine and repetitive tasks, but it has also transformed human service delivery across the state. In other words, the state has created a robust robotics workforce whose positive impact is felt by county caseworkers, state employees, and perhaps most importantly, Ohioans.

For quite some time, governments have been faced with overwhelming workloads. This is also compounded by an ever-increasing demand for high quality, personalized public assistance. These realities were further underpinned by the ongoing challenges posed by COVID-19, which has forced Ohio to rethink how it operates, and where. When faced with these mounting pressures, Ohio turned to a collaborative approach in identifying AI tools to tackle low complexity tasks as outlined in Figure 1.



**FIGURE 1:** Ohio has focused heavily on leveraging Assisted Intelligence to alleviate the burden on the Counties in working and processing public assistance programs.

## THE IMPLEMENTATION

Ohio’s automation journey is much more than just building and supporting automations or “bots.” It is about understanding and recognizing the fundamental transformation of the business and how automation can augment and enhance the delivery of services. Taking this a step further, Ohio understands that any successful automation implementation requires integrating and improving human and machine collaboration over the long term. The state’s approach to developing Bots, as illustrated in Figure 2, is founded on these core values and made possible by a model that drives the end-to-end automation lifecycle, from initial discovery and value identification for the automations, through the implementation activities, and continuing into the business process support and technical collaboration.



## KEY STAKEHOLDER INVOLVEMENT

Throughout the bot lifecycle, DAS closely coordinated with ODM, ODJFS, and county representation to evaluate and assess the automation potential for each identified use case. In






addition, every automation was developed and implemented with the county user in mind. As such, county users were often leveraged as subject matter experts to evaluate the effectiveness of a proposed automation during the design phase. This allowed for constant feedback mechanisms and an opportunity to address any concerns prior to deployment.

Throughout these conversations, stakeholders understood that automation is never 100%. The state’s work of administering public services is complex and requires human judgment that cannot be replaced by bots. As such, the conversation on automation was always framed as an opportunity to leverage technology to augment Ohio’s workforce, never to replace. Finally, all automation deployments were preceded by in-depth trainings to provide all 88 counties with insight into the process. Ohio learned that actively engaging key stakeholders throughout empowers workers to be champion adopters of automation in the field.

Lastly, the Bots are supported by technologies and infrastructure that were made possible by the DAS Office of Information Technology (OIT). From identifying appropriate access and

## OHIO BENEFITS PROGRAM FAMILY OF BOTS

### BOTS DEPLOYED SINCE 2020

	<b>LTC PENDING RECORD REMOVAL BOT</b> DEPLOYED IN SEPTEMBER 2021	▶	Reviews and removes LTC pending records that were created by the client via the SSP when long-term care services were not actually needed
	<b>DRC BOT</b> DEPLOYED IN JUNE 2021	▶	Processes new incarceration alerts to ensure individual is assigned to proper Medicaid incarcerated aid code and disenrolled
	<b>QUALITY ASSURANCE BOT – VERSION 2</b> DEPLOYED IN MAY 2021	▶	Verifies case processing information had been accurately entered by case workers for SNAP recertification cases with reported income.
	<b>THE BABY BOT</b> DEPLOYED IN MARCH 2021	▶	Processes newborn Medicaid eligibility for all counties. Previously, the metro county baby bot provided <b>30,700+ newborns</b>
	<b>MYCARE BOT</b> DEPLOYED IN JULY 2020	▶	Promptly flips individuals previously on a legacy waiver to the MyCare waiver and prevents interruption in benefits.

### PROOF OF CONCEPT BOTS DEPLOYED PRIOR TO 2020




	<b>INTERIM REPORTING BOT</b> PROOF OF CONCEPT	▶	Reviews and processes scanned Interim Reports to prevent inadvertent auto discontinuance from delayed processing.
	<b>PREGNANCY BOT</b> PROOF OF CONCEPT	▶	Reviews and processes an alert for new pregnancies. Ensuring the new mothers are added to the correct aid code.
	<b>SSP CASE LINKING REQUEST BOT</b> PROOF OF CONCEPT	▶	Reviews case linking requests that are submitted by individuals who would like access to their case in Ohio Benefits, providing residents with immediate access.

FIGURE 3: Meet the Ohio Benefits Program Family of Bots

security roles to configuring communication methodologies that are safe and secure, DAS OIT engaged their IT and security teams during the design process to ensure that all deployments were safeguarded by industry best practices.

## **THE IMPACT - MEET THE OHIO BENEFITS PROGRAM FAMILY OF BOTS**

The Bots are a collection of automations that reduce the burden of repetitive tasks for workers and allow them to deliver value to all Ohioans. The Bots not only delivered tremendous time savings, but they helped the state address some of its most critical issues.

Like many transformational efforts, the program started small to prove the concept, technology, and intended impact. Additionally, given the stakeholder groups, the team spent a great deal of time socializing the concept with the counties to gain buy-in and adoption. To prove success, the program launched a proof of concept effort that would allow each of the agencies involved to prioritize and drive a Bot to completion under their vision, all while working collaboratively across stakeholders as one team.

The proof of concept resulted in three automations that proved to all stakeholders the impact that Bots could have to streamline their processes and give time back to workers. Those three automations were:

- **The Pregnancy Bot** - The Pregnancy Bot is designed to support Ohio’s NurtureOhio System, better known as the web-based Pregnancy Risk Assessment Form, which connects with the Ohio Benefits system to notify counties of a Medicaid individual’s pregnancy for eligibility determination.
- **The Interim Reporting Bot** – ODJFS collaborated with the counties and leveraged the state’s document management system to design and deploy the Interim Reporting (IR) Bot. The interim report process is a compliance requirement for SNAP. The IR document must be marked as received in the Ohio Benefits system; otherwise, an auto discontinuance batch process will discontinue benefits for the customer.
- **SSP Case Linking Bot** - Ohio’s Self-Service Portal (SSP) Case Linking Request Bot is designed to review case linking requests that are submitted by Ohioans who would like to access their case in Ohio Benefits. The Bot retrieves these requests and reviews key personally identifiable information related to the case to determine whether a case should be linked.

With the successful completion of the proofs of concept, all stakeholders were able to see and feel the impact, not only of the automations but also of their collaboration and partnership and the power of shared mission and collective vision. With this success, all stakeholders reinforced their commitment to build the Ohio Benefits Program Family of Bots to unleash a first of its kind workforce across the state.

With that commitment and excitement, the Ohio Benefits Program launched a full-scale effort early in 2020 to create a robust pipeline of automations that will continue to support the counties and alleviate the administrative burden to the greatest extent possible. All stakeholders came together to identify potential bots that would make the greatest impact on the workforce. Those ideas were collectively prioritized and the work to design, test and implement began.

The following section outlines the journey and impact of the Bots developed and deployed after the proof of concept phase of the project. These Bots run on a regular schedule and are making an impact every day in the lives of the county caseworkers and Ohioans who feel the direct benefit of their work.



In September of 2021, ODM leveraged process automation

technology to conduct a data clean-up effort in the Ohio Benefits system. Specifically, ODM recognized the need to reduce the number of irrelevant long-term care (LTC) records that may have been created by the customer at application intake. The LTC pending record removal bot was designed in close partnership with county representatives to remove LTC records in the system when long-term care services were not in fact required.

Since deployment, the Bot has removed approximately 30,000 pending records in the system and assisted with overall data clean-up within Ohio Benefits.



In June of 2021, DAS in coordination with ODM

successfully deployed a Bot to process Medicaid eligibility for newly incarcerated individuals. The automation, referred to as the Department of Rehabilitation and Correction (DRC) Bot, leverages new incarceration data from DRC to process an alert within the Ohio Benefits system.

The Bot uses DRC information to update the individual’s case information, before re-determining Medicaid eligibility to ensure that appropriate Medicaid services are provided. Separately, the DRC Bot corresponds directly with counties by sending daily reports that include exception cases that require follow-up. The DRC Bot also enters detailed case journal notes to ensure that caseworkers are aware of any necessary follow-up activity.

Every month, the DRC Bot reviews approximately 4,000 new incarceration alerts, and can process over 60% of these alerts from end-to-end within 24 hours of receipt. The remaining alerts are shared directly with counties for exception processing. Since deployment, the Bot has fully processed approximately 23,000 alerts, resulting in an estimated 2,000 hours of time reallocated for workers across the state.



The ODJFS leveraged Process Automation technology in an

innovative way to support county communication and training efforts to improve the accuracy of case processing activities. In May of 2021, the Quality Assurance (QA) Bot was deployed to review active SNAP cases that were already processed for recertification. The QA Bot and its ability to review error-prone activities efficiently and accurately was the first of its kind to be deployed in Ohio and expanded what is possible with RPA technology.

Specifically, the QA Bot tracks possible inaccuracies in earned income details entered by county workers in Ohio Benefits. At the end of its review, the bot generates a report listing identified cases with potential earned income issues, which is shared with counties for review. The QA Bot provides counties with a lead for case reviews so workers can more effectively determine if corrections need to be made.

The QA Bot was deployed in three phases. In the first phase, the bot identified cases that were processed with potential pay frequency inconsistencies. Later, the QA bot was enhanced to review specific income records to ensure pay amounts were similar and consistent across pay periods. Finally, the bot was enhanced to identify potential invalid employment records associated with earned income.

Every month, the QA Bot reviews approximately 6,000 cases for potential earned income issues. The bot is expected to save ODJFS over 100 hours a month in QA activities.



The Baby Bot is designed to add a newborn’s

information to their mother’s Medicaid case and determine the newborn’s eligibility for Medicaid services. The Bot was originally piloted with a metro county and expanded statewide in March of 2021, at the height of the COVID-19 pandemic. At a high level, the Baby Bot receives newborn information from each of Ohio’s managed care plans for processing. The Bot then navigates through dozens of screens and hundreds of mouse clicks and keystrokes within the Ohio Benefits

system to accurately enter the newborn’s information and determine eligibility for Medicaid. To dramatically reduce the turnaround time for processing, the Baby Bot corresponds directly with managed care plans and with the state’s 88 counties when it encounters an exception while processing.

Since the Bot was first deployed, it has enhanced the State’s ability to ensure that newborns, the most vulnerable members of our society, have access to the care they need as soon as they need it. To date, the Baby Bot has provided 50,000+ newborns with access to Medicaid within the same day of receiving the information. Previously, the same activities would take counties seven to ten days to process due to their significant workload.

Separately, an additional 30,000 newborns that were sent from the managed care plans were reviewed by the Baby Bot and identified as requiring further caseworker review based on its assessment. In these instances, the caseworker is notified and provided with a guided path to directly address the issue identified in the case. These “Smart Exceptions” provide further time savings by removing the investigative work previously required to resolve an issue. In addition to the reduction of the overall time required for processing the newborns, the Baby Bot’s activities have resulted in tremendous time savings for county workers. This is time that can now be spent on high value tasks that require their attention. Finally, managed care plans now receive enrollment information for their newborns within days of submission, providing improved access to care and appropriate capitation payments. This significantly decreases submissions to ODM’s managed care reconciliation area and the administrative burden associated with the investigation of those cases.



The MyCare Bot processes MyCare waiver flips in Ohio Benefits to ensure

that capitation payments for MyCare (individuals who are fully eligible for Medicare and Medicaid services) are properly/accurately made. Prior to the Bot, delayed MyCare waiver processing resulted in inaccurate capitation payments and backlogged cases. The MyCare Bot was designed in close coordination with Ohio’s PASSPORT Administrative Agencies (PAAs) and Case Management Agencies (CMAs).

Today, the MyCare Bot removes the burden of manual data entry for PAAs and CMAs so they can focus on processing more complex and nuanced cases. Since July 2020, the MyCare Bot has processed over 6,000 waivers from end to end, reallocating approximately 500 hours in operational hours for workers.

**COLLABORATION + INNOVATION = SUCCESS**

**A STORY OF EFFECTIVE CROSS-AGENCY COLLABORATION DRIVING SUCCESS THROUGH INNOVATION**

The operational efficiencies and time savings generated by these Bots are groundbreaking within the state and local government space. This technology and the variety of use cases provides a blueprint for other state government agencies to adapt and repurpose. While the Bots were customized to enhance business process efficiencies within Ohio Benefits, the challenges of repetitive tasks that may be prone to human error transcend state borders. Given the appropriate change management strategies, the same technological innovations in Ohio can be adapted for other state government entities.

While the impact to counties is felt through the Bots, the true success story is how three agencies and 88 counties came together under one singular mission and focus, to address a major and systemic challenge impacting Ohioans and their ability to receive the healthcare or public assistance that they depend on for their livelihood.

The State of Ohio saw a challenge and agreed to join forces, united in their commitment to think differently. They took a risk, found success and in that success, established a new precedence for how government organizations can break down bureaucratic silos to collaborate, and ultimately make a difference in Ohioan’s lives.