



November 1, 2023

The Honorable Rachel Zenzinger  
Chair, Joint Budget Committee

Senator Zenzinger:

The Colorado Department of Human Services, in response to reporting requirements set forth in Section 26-1-121.5, C.R.S., respectfully submits the attached Feasibility of Comprehensive Assessment of Public & Medical Assistance Programs report.

*(d) ON OR BEFORE NOVEMBER 1, 2023, THE STATE DEPARTMENT SHALL SUBMIT AN ANALYSIS OF THE FISCAL IMPACT OF IMPLEMENTING THE RECOMMENDATIONS REQUIRED IN SUBSECTION (2)(b) OF THIS SECTION TO THE JOINT BUDGET COMMITTEE. THE ANALYSIS MUST INCLUDE A DETERMINATION OF THE FEASIBILITY OF IMPLEMENTING THE RECOMMENDATIONS, A TIMELINE FOR IMPLEMENTATION, AND COST OF IMPLEMENTATION FOR EACH FISCAL YEAR INCLUDED IN THE TIMELINE. THE ANALYSIS MUST ALSO INCLUDE A DISCUSSION OF ANY CONCERNS EXPRESSED BY THE STATE DEPARTMENT, THE DEPARTMENT OF HEALTH CARE POLICY AND FINANCING, OR THE COUNTY DEPARTMENTS RELATED TO THE COMPREHENSIVE ASSESSMENT AND RECOMMENDATIONS DESCRIBED IN SUBSECTIONS (2)(a) AND (2)(b) OF THIS SECTION.*

If you have any questions, please contact Angelica Granados, CDHS' Legislative Analyst, at 303-877-0562.

Sincerely,

*Kevin Neimond*

Kevin Neimond  
Interim Co-Executive Director



**Best Practices in Improving the Administration of Public & Medical Assistance  
Recommendations ~ Feasibility, Timelines, and Costs  
November 1, 2023**

Background

As directed by S.B. 22-235 (codified in 26-1-121.5), the Department of Human Services submitted a comprehensive assessment of best practices in administering public and medical assistance programs in Colorado, including recommendations for improving efficiency in operating programs and delivering benefits to Coloradans, to the General Assembly on June 30, 2023. That report was prepared by the Department’s contractor, Public Consulting Group (PCG), using information learned/gathered through a comprehensive review of program policies, processes, information systems, and county workforces. The work included a number of data points, including reviewing the landscape in Colorado and peer states, reviewing policies and performance data, surveying county eligibility technicians and managers, and visiting county offices.

The entire process was a collaborative effort among the Department of Human Services, Department of Health Care Policy and Financing, and county departments. The solicitation and selection of the vendor was a joint effort among these partners. Additionally, the vendor’s work was guided by a project team that included program managers from CDHS and HCPF and three county representatives who were selected by the County Human Services Directors Association (CHSDA). The State and county representatives met with the vendor at least monthly throughout the study and provided input in every step of the process. The final report, including the assessment and recommendations, was generally well received by all stakeholders. CDHS and HCPF fully concur with the recommendations and importance to address them, as presented in this report. CHSDA agreed with the majority of the recommendations and expressed some concerns with a few of them, as noted in this report and articulated in their letter included in Appendix A.

Approach to Prioritization

The Colorado Department of Human Services and Department of Health Care Policy and Financing (collectively referenced as “State departments” or “State”) agree that all of the recommendations that emerged from the Comprehensive Assessment of Best Practices will improve access to and delivery of public and medical assistance programs at the State and local levels, including improved access, timeliness, administrative efficiency, and cost effectiveness as

envisioned by S.B. 22-235. However, the State prioritized recommendations based on an analysis of the feasibility, systemic impact, dependency on other work that needs to be accomplished, anticipated cost, and timelines required for each. The State estimates that most of the recommendations would take several years to implement; furthermore, implementation is dependent on securing the additional resources and approvals. In addition, the State will work with county departments over the coming years to fully map operational changes needed to move the recommendations forward, as resources allow.

### Prioritized Recommendations

The following recommendations are deemed the highest priorities by the State (in no particular order):

#### Create opportunities for **State and county collaboration** and **Policy documentation**

This recommendation would enhance collaboration and communication between CDHS and HCPF in order to streamline policy and case review questions and processes. In turn, collaborative processes will be enhanced between the State and county departments. The State prioritized this among its highest recommendations because it is a foundation for success among all the other recommendations and will significantly impact both county staff and customers seeking assistance. County departments are especially eager for better documentation and dissemination of policies and regulations guiding public and medical assistance programs. Overall, enhancing collaborative processes and documenting policies will be critical to operating programs efficiently and delivering benefits to Coloradans quickly and accurately. However, implementing this recommendation will require time, resources, and commitment to align agency approaches to create effective processes. Required resources to implement this recommendation are described in the “Resources and Timeline” section below.

#### Develop **service delivery standards** for public and medical assistance programs

This is a systemic recommendation that is critical to improving program access, equity in service delivery, administrative efficiency, and cost effectiveness. Implementing it will require CDHS and HCPF to develop service delivery standards and be fully aligned on the application of those standards and support to counties in implementing them. It is important to note that these standards may allow for some county discretion. Yet, flexibility would be in the approach, not the core requirements. However, counties have expressed concern with this recommendation and believe that varied service standards are important to supporting the unique needs of their communities. Progress in this area will ensure that clients have consistent access to services and experiences, counties have clear expectations of the service delivery standards, and the State can consistently measure performance across Colorado. Required resources to implement this

recommendation are described in the “Resources and Timeline” section below.

#### Improve **hiring and retention** practices

Implementing this recommendation would help counties to attract and retain a talented workforce and ensure that clients receive high quality service delivery. Ultimately, it would facilitate progress in improving access to and delivery of public and medical assistance programs across Colorado. Counties agree with this recommendation; however, counties want to ensure that responsibilities are clearly delineated between the State and Boards of County Commissioners in areas of hiring and retention practices. Resources would be required to implement this recommendation; timing is dependent on completion of the funding model in 2024 (per the second phase of S.B. 22-235), as described in the “Resources and Timeline” section below.

#### Continue improving the current **training** model

Currently, the State develops training content and curricula to a) onboard new eligibility workers by learning the various public and medical assistance program policies and using the Colorado Benefits Management System (CBMS) to process applications for assistance; and b) refresh skills and knowledge among all eligibility workers as new policies are applied for CBMS programs. However, the processes for delivering the content and ensuring eligibility workers become competent is applied inconsistently across the State. This inconsistency creates variations in clients’ experiences and can lead to avoidable errors in cases. Some important changes to the training environment are currently underway. However, prioritizing efforts to modernize the training environment, standardize and facilitate practices for newly trained workers to become proficient, and enhancing training content would amplify the training environment and ensure eligibility workers have the skills and knowledge to be successful in their jobs and clients receive accurate, timely benefits. Counties agree that enhancing the training environment in these ways will improve delivery of public and medical assistance across Colorado. Required resources to implement this recommendation are described in the “Resources and Timeline” section below.

#### *Other Recommendations:*

As noted above, CDHS and HCPF agree that all of the recommendations that arose from the Comprehensive Assessment of Best Practices will improve access to and delivery of public and medical assistance programs at the State and local levels, including improved access, timeliness, administrative efficiency, and cost effectiveness. The following recommendations are aligned with work that is already underway, with some funding available.

#### Make **work accessible** or **portable**

Implementing a single statewide document and work management system is a key component

to improving the customer experience and enabling counties to track and manage their work in a dynamic way. The existing Joint Agency Interoperability (JAI) project is working towards this goal, beginning with replacing the existing Electronic Document Management System. The State deems this a high priority. Counties generally support this recommendation, as well. However, because the implementation timeline and costs will be dependent on the downstream choices from work that has already begun, including the scope of a work management system, this recommendation was prioritized behind other recommendations. Additional resources for this project may be necessary, but would be requested in the future.

### Optimize **PEAK**

An online system, like PEAK, is a key component to providing seamless access to public and medical assistance to Coloradans seeking assistance. However, PEAK's current functionality tends to confuse clients and frustrate eligibility workers. The State has recognized these issues and was successful in securing funds to upgrade and improve PEAK beginning in FY 2023-24. Thus, CDHS and HCPF agree that it is prudent to wait for the initial changes to be implemented before prioritizing the next set of critical upgrades and/or seeking additional funding and directives to further enhance PEAK. Improving PEAK is a top priority for counties who believe that ongoing attention to PEAK enhancements will derive swift and positive results.

### Align **administrative requirements**

CDHS and HCPF agree that it is inefficient for counties to comply with multiple timelines and administrative requirements for similar tasks (e.g. management evaluations, quality assurance samples, data reporting). Counties fully agree with this recommendation and believe it would be a quick win. However, completion of some of the higher priority recommendations will provide a framework for making headway on this recommendation. Additionally, aligning administrative requirements among Medicaid, SNAP, and TANF depends on federal requirements. Public and medical assistance programs tend to be highly regulated by federal agencies, leading to less flexibility on potential alignments.

### Resources and Timelines

Developing a comprehensive, user-friendly policy manual will require time and resources from CDHS and HCPF in order to improve **policy dissemination** and **case review collaboration**. Specifically, resources will be critical to ensure dedicated policy experts to enable real-time problem solving on complex cases and policy questions, including researching questions and providing uniform guidance, direction and communication to all counties. Successfully implementing this recommendation also requires devising a centralized policy manual for all public and medical assistance programs and keeping it current. Estimates of the resources require to implement this recommendation effectively include the following:

- HCPF: 1.0 Complex Case Resolution Specialist (Soc Svcs Spec III) to assist counties with complex cases and coordinate with CDHS, as needed, on the responses; 1.0 County

Communications Coordinator (Soc Svcs Spec IV) to manage and direct the policy manual process and collaborate with CDHS; 1.0 Eligibility Policy Manual Advisor (Soc Svcs Spec III) to write detailed eligibility policy in a centralized policy manual; 1.0 County Liaison (Liaison IV) to improve communication, websites, and engagement with counties. These resources would be needed on an ongoing basis.

- **Total HCPF FTE cost = \$472,426 (personal services and operating)**
- CDHS: 1.0 Complex case resolution specialist (Soc Svcs Spec III) to provide detailed eligibility policy information and assist counties with complex cases; 1.0 Policy analyst (Soc Svcs Spec IV) to manage CDHS policy manual process, write and update detailed eligibility policies in a centralized policy manual, and coordinate with HCPF. These resources would be needed on an ongoing basis.
  - **Total CDHS FTE cost = \$236,213 (personal services and operating)**
- Agencies estimate that it would take approximately *18-24 months* to implement this recommendation, including securing the funding for the requisite FTE, hiring staff, and beginning the work. The major dependency in the timeline is the time to post, hire, and onboard positions to implement this recommendation. Once positions are hired, it will take some time to document the array of policies, regulations, and statutes that drive practice. Meanwhile, HCPF and CDHS have been actively working to improve collaboration and communication in all facets of their shared work. This work will continue and intensify as other recommendations and improvements are implemented.

Both CDHS and HCPF will need resources to collaboratively create and implement **service delivery standards** alongside counties, and support them in implementing those standards. Additionally, counties may require resources to implement the standards with fidelity; those resource needs would be identified through the financial model that will be developed in 2024. Estimates of the resources and time required to implement this recommendation include the following:

- HCPF: 1.0 Eligibility Business Process Advisor (Soc Svcs Spec IV) to develop eligibility business process standards and coordinate with CDHS on standards, as applicable; 1.0 County Administration Process and Policy Advisor (Soc Svcs Spec IV) to develop administrative business process standards, implement standards in rule/contracts, and align administrative requirements w/ CDHS. These resources would be needed on an ongoing basis.
  - **Total HCPF FTE cost = \$255,514 (personal services and operating)**
- CDHS: 2.0 Business Process advisors (Soc Svcs Spec IV) to develop eligibility and administrative business process standards and coordinate with HCPF on standards, as applicable; 1.0 Communications Advisor (Soc Svcs Spec IV) to work closely with HCPF and counties to clearly articulate and communicate the business standards, ensure standards are clearly articulated in documentation and communication, and more. These resources would be needed on an ongoing basis.
  - **Total CDHS FTE cost = \$255,514 (personal services and operating)**
- CDHS/HCPF estimate that it would take approximately *two years* to implement this

recommendation, including securing the funding and hiring FTE; identifying and writing standards; and establishing criteria to measure performance. Statute and/or rule change may be needed to standardize some elements. Implementing this recommendation requires a significant investment of time and expertise to articulate and document the standards and develop processes to support counties in implementing them.

Resources will be required to improve **hiring and retention practices** throughout Colorado. These resources will be needed to collect and analyze eligibility worker pay scales across the State and potentially adjust administrative allocations to counties. Estimates of the resources required to implement this recommendation include the following:

- CDHS/HCPF will need to procure a vendor to complete a compensation analysis across county eligibility workers. Additional resources may be required to implement the results of the compensation analysis to ensure equitable compensation across Colorado. The estimated costs to implement this recommendation will be determined after the funding model is completed in July 2024 and run in the fall.
- In addition to the compensation analysis, the vendor will also need to work towards standardizing position descriptions and career paths at county departments, in collaboration with the State and county departments.
- The State Departments may require additional staffing resources for this recommendation. However, it would be dependent on completion of the funding model report in 2024.
- Counties may require additional, ongoing resources to implement this recommendation.
- Costs to address compensation will be included in the funding model report to be submitted to the General Assembly in November 2024. This recommendation will not likely begin until *after 2025*.

Resources are needed at the Staff Development Divisions (SDD) to improve the **training model**, including expanding the training curricula, modernizing the training environment, and facilitating standardized nesting practices statewide. Changes to the training environment are currently underway, thus staff are the primary resource needed. Estimates of the resources and time required to implement this recommendation include the following:

- 4.0 Trainers (Training Spec III) would be required (shared costs between CDHS and HCPF) to develop, deliver, and facilitate a new array of training opportunities for all county eligibility workers. These resources would be needed on an ongoing basis.
  - **Total SDD cost = \$433,823 (personal services and operating)**
- The SDD estimates that it will take approximately *12-18 months* to implement this recommendation, including securing the funding for the requisite FTE, hiring and onboarding staff, and beginning the work. The major dependency in the timing is the time to post, hire, and onboard positions to implement this recommendation. Once the FTE are in place, work should progress quickly.

## Appendix A

CHSDA Letter, July 5, 2023

Appendix B

PCG Recommendations



**President:**  
Mary Berg  
Jefferson County

**Vice President:**  
Katie McDougal  
Adams County

**Treasurer:**  
Cheryl Ternes  
Arapahoe County

**Secretary:**  
Dan Makelky  
Douglas County

**Past President:**  
Janeen McGee  
Lake County

**Largest County:**  
Jay Morein  
City and County of  
Denver

**At Large:**  
Donna Rohde  
Otero County

**Northwest Region:**  
Megan Burch  
Eagle County

**Northeast Region:**  
Kara Hoover  
Yuma County

**Metro Region:**  
Jamie Ulrich  
Weld County

**Southeast Region:**  
Kim Mauthe  
Teller County

**Southwest Region:**  
Jill Calvert  
Mesa County

**San Luis Valley Region:**  
Jody Kern  
Rio Grande/Mineral  
County

Joshua Montoya, Local Partnerships and County Programs Section Manager  
Colorado Department of Health Care Policy and Financing  
1570 Grant Street  
Denver, CO 80203

Barry Pardus, Deputy Director  
Colorado Department of Human Services  
1575 Sherman Street  
Denver, CO 80203

July 5, 2023

Dear Joshua and Barry,

Senate Bill 22-235 required an assessment of the delivery of public and medical assistance programs in the State of Colorado. Both the Colorado Department of Human Services (CDHS) and Colorado Department of Health Care Policy and Financing (HCPF) worked together to secure a third-party vendor, Public Consulting Group (PCG), who provided a list of recommendations that focused on a review of policies, processes, workforce, and technology infrastructure.

During the assessment phase, counties worked directly with PCG to schedule site visits and staff focus groups, and to complete surveys to help inform PCG's recommendations. Additionally, PCG looked to other state supervised, county administered agencies and evaluated best practices in those states. The outcome was a document that offered six transformative recommendations and three quick win recommendations. Eleven additional opportunities were noted but not included in the formal recommendations.

Counties have now had the opportunity to review the recommendations that resulted from our collaborative work, and we would like to formally share our initial impressions and reactions.

## TRANSFORMATIVE RECOMMENDATIONS

### **Recommendation 1: Develop service delivery standards for public and medical assistance programs**

Counties believe it is misleading to say that there are 64 different service delivery models across the State. Over the past ten to fifteen years, counties have actively participated in numerous business process redesign efforts, at the request and with the support of CDHS and HCPF. These efforts have both modernized and standardized business practices, as well as improved overall service delivery. While the Public Health Emergency has created the need to review and potentially innovate new strategies for the business processes and practices developed through business process redesign efforts, counties argue that counties should not be mandated to adopt standardized models of service delivery.

within this recommendation. There may not be a one size fits all service delivery model that could be applied statewide.

Counties are concerned that an assumption was made in this recommendation that varying service delivery models lead to inaccurate or incorrect eligibility decisions. We do not see data to support this statement in the report provided.

### **Recommendation 2: Make work accessible and portable**

Counties are generally in support of this recommendation. Having said that, many counties have invested in document and work management systems like HS Connects. Starting all over with a new document and work management system is concerning considering the investment in time and money several counties have already made. We encourage the State to consult heavily with counties to explore the benefits and shortcomings of current systems to ensure that if this recommendation is pursued, we have a system that works well for all counties and the State's needs.

Often, counties are providing workload and performance data directly from our work management systems to peer counties and to the State. We are deeply concerned about losing visibility and transparency should this shift to a State created and State managed solution.

We also have concerns about competing priorities between higher level program groups and timeframes required to work documents. Counties are experts at triaging work using program rules and requirements. Having a state-designed system that cannot be customized by a county could limit counties' abilities to react and respond to changing circumstances and adversely impact the clients we serve.

### **Recommendation 3: Modernize and customize eligibility worker roles, career paths, and compensation**

Counties agree that eligibility staff are underpaid in many circumstances based on the technical and financial nature of their work. We agree with the recommendation of suggested base pay rates across the State, taking into consideration local factors. We would further ask that the State help county offices better define the complexity of eligibility work, perhaps aligning the job more closely with prevention services, to help local county commissioners better understand the intricacy of the work.

While we agree with the recommendation overall that we need to modernize and customize eligibility worker roles, career paths, and compensations, we are not sure of the State's role versus the local Boards of County Commissioners in human resource functions such as changing job classifications. Including local County Human Resource experts in these conversations is critical. Often, job classifications are in place across the entire county and impact positions that are not linked to human services. Proposed job classification changes could result in shifts from non-exempt to exempt positions, which could unintentionally change job requirements that could

#### **Recommendation 4: Optimize PEAK**

Counties support this recommendation and believe this should be a top priority if the recommendation is accepted. PEAK was launched with the intention of reducing eligibility technician processing time. This simply has not been the case. Technicians struggle with client data entry and deletions. We question why system functionality was created in this way and wonder whether the function of client entries into PEAK mapping to CBMS can be eliminated. In some cases, clients are editing a case at the exact time the technician is working the case, which introduces confusion for all. Clients submitting the same document over and over also increases the touch time for staff working the PEAK inbox, imaging, and indexing documents. It is our understanding that there will be some enhancements to the mobile applications soon to help prevent duplication, but at this time all counties continue to be adversely affected.

#### **Recommendations 5: Improve policy documentation and dissemination**

Counties support this recommendation and believe this should be a top priority. A single policy manual that encompasses all program areas in CBMS and is written in plain language is needed. This could include examples, with search functions and links to expedite access to review rule, as well as policy and operational requirements. In addition to having a central location for this, having the ability to track and share questions and State responses would be a tremendous source of support for eligibility teams across the State.

It is imperative that counties be at the table and involved in policy discussions and we are pleased to see the vendor call this out in their recommendations. Counties are critical partners and should be involved in all policy change discussions that impact the way that counties deliver services to our communities.

Counties are frequently challenged by competing priorities and conflicting policy between HCPF and CDHS. Having the two state Departments align wherever possible will improve service delivery and lessen confusion for both our eligibility teams and clients.

#### **Recommendation 6: Continue with improvements to the current training model**

Counties have mixed reactions to this recommendation. The State currently creates and shares all training content, defines how trainings will be delivered (in person or web-based), and certifies all trainers that are using the content to train new workers. Counties do not agree that the training is being delivered differently across the State. We do see the importance of utilizing trainers in person at the county to aid new and seasoned eligibility technicians through very complex system and policy training. Counties are currently supplementing training to ensure that new workers understand county specific business processes, imaging systems, work management systems, client demographics, de-escalation techniques, etc. that rests outside of the Staff Development Division. Further, there is an opportunity for county trainers to focus on specific error trends as identified through internal and State quality assurance outcomes improving eligibility decision outcomes.

We agree that the TRN environment does not provide “real life” outcomes, and this can cause confusion for the technician when they leave training and begin working in the production area of CBMS.

## **QUICK WIN RECOMMENDATIONS**

### **Quick Win 1: Create opportunities for State and county collaboration**

Counties agree with this recommendation. Counties struggle to receive clear guidance from the State when questions arise. Often, we are met with email box automated responses that indicate the State is unable to respond promptly, and this only delays our ability to help our clients. Policy misalignment between CDHS and HCPF is an ongoing struggle, and we are pleased to see this called out as an area of concern in the vendors recommendations.

### **Quick Win 2: Increase communication and collaboration between CDHS and HCPF**

Counties support this recommendation. Since being separated, CDHS and HCPF have consistently been misaligned in policy, practice, and direction. The offices often do not present as if they are working together when changes are made, and there is an entirely different approach to county involvement and approval for policy and rule changes. Sub-PAC exists to inform and vote on changes for CDHS programs but there is not a similar structure for HCPF changes, which prevents the opportunity for valuable county feedback.

### **Quick Win 3: Alignment of administrative requirements**

The counties agree with this recommendation. There are opportunities to align the management evaluation process between the two agencies. Conducting the evaluations jointly would reduce administrative burden for both the State and counties.

The counties believe that this quick win would be extremely valuable in improving communication and collaboration between CDHS, HCPF, and county partners as noted in Quick Win #2. Counties must create separate processes to support requirements in quality assurance as well as proactive or reactive work that occurs through report work for Public Assistance and Medicaid work.

Management Evaluation Reviews can occur up to three times per year, depending on the county, and are very different from each other in the implementation. Counties spend numerous hours preparing for the review and responding to the outcomes associated. Alignment in these duties and requirements would maximize efficiencies for counties, creating more time to dedicate to our clients and communities.

We are very hopeful that the State will embrace a partnership with counties when considering these recommendations and truly begin to make meaningful changes in a way that will best assist the State, the counties, and the community members we serve daily.

# Assessing Best Practices in the Administration of Public and Medical Assistance Programs in County-Administered States

Recommendations

*June 2023*

## CONTENTS

Background.....	3
Recommendation Organization.....	4
Recommendation 1: Develop Business Process Standards for Public and Medical Assistance Programs.....	7
Recommendation 2: Make Work Accessible and Portable.....	14
Recommendation 3: Improve Hiring and Retention Practices.....	21
Recommendation 4: Optimize PEAK.....	30
Recommendation 5: Improve Policy Documentation and Dissemination.....	40
Recommendation 6: Continue with Improvements to the Current Training Model.....	49
Quick Win 1: Create Opportunities for State and County Collaboration.....	59
Quick Win 2: Increase Communication and Collaboration between CDHS and HCPF.....	60
Quick Win 3: Align Administrative Requirements.....	61
Additional Opportunities.....	62
Appendix.....	64



## BACKGROUND

Senate Bill 22-235 charged the Colorado Department of Human Services (CDHS) and Health Care Policy and Finance (HCPF) with assessing the delivery of public and medical assistance programs in the state. As part of the assessment, the departments were charged with making recommendations in the following two areas:

State and county public and medical assistance program policies, processes, size, and structure of program workforce, and information systems infrastructure to ensure:

1. Improved access by eligible individuals to public and medical assistance programs,
2. Timeliness of applications processing,
3. Administrative efficiency, and
4. Cost effectiveness

Ongoing evaluation methods of the recommendations for public and medical assistance program system, including appropriate metrics for determining whether the efficiency and cost-effectiveness of the system has improved as a result of the implementation of recommendations.

This document contains draft recommendations for the departments' review. There are two types of recommendations:



**Transformative recommendations:** Recommendations that will help transform the system itself or the effectiveness of the system. These recommendations will require a year or more to complete.



**Quick win recommendations:** These recommendations can be implemented more quickly and would result in substantive changes that will improve service delivery more quickly and more easily. These should take less than a year to complete.

## RECOMMENDATIONS ORGANIZATION

### Description

- Describes the recommendation and the justification for it
- Outlines which of the four efficiencies will be helped

### What does success look like?

- Describes success for clients, counties, and the state

### Implementation Plan

- Outlines the various steps spread across three phases to implement each recommendation

### Considerations

- Provides additional details like who should be included, policy constraints, costs, and the duration for implementation

### Benchmarks

- Describes the metrics, data needed for tracking, and the approach for tracking and monitoring success



## BENCHMARKS

Both CDHS and HCPF currently track and measures a variety of metrics to assess the performance of the counties and the state in the administration of the public and medical assistance programs. The three primary metrics are timeliness, accuracy of eligibility determinations, and customer satisfaction. Additional metrics include, but are not limited to, call center wait times, call center speed to answer, and number of customer complaints.

Each recommendation outlined here is expected to improve the existing metrics – either directly or secondarily. Thus, these existing metrics are not specifically discussed in the benchmarking section of each recommendation. Rather, the benchmarks and metrics identified are those that are important and specific to that unique recommendation and must be tracked and measured separately.

## RECOMMENDATIONS OVERVIEW

Transformative Recommendation #	Transformative Recommendation	Quick Win #	Quick Win
<b>Transformative Recommendation 1</b>	Develop service delivery standards for public and medical assistance programs	<b>Quick Win 1</b>	Create opportunities for state and county collaboration
<b>Transformative Recommendation 2</b>	Make work accessible and portable	<b>Quick Win 2</b>	Increase communication and collaboration between CDHS and HCPF
<b>Transformative Recommendation 3</b>	Improve hiring and retention practices	<b>Quick Win 3</b>	Align administrative requirements
<b>Transformative Recommendation 4</b>	Optimize PEAK		
<b>Transformative Recommendation 5</b>	Improve policy documentation and dissemination		
<b>Transformative Recommendation 6</b>	Continue with improvements to the current training model		

**Recommendation 1: Develop Business  
Process Standards for Public and  
Medical Assistance Programs**

## Recommendation 1: Develop Business Process Standards for Public and Medical Assistance Programs

Colorado currently does not have business process standards for its public and medical assistance programs. As a result, there are 64 different ways that business is conducted, leading to an uneven and unequitable delivery of these programs.

**CDHS and HCPF should establish a series of business process standards that all counties must employ.** These business process standards can include both the types of activities as well as the technology that must be used. Implementing these standards will allow for more consistency and equity in the customer experience. They will also make it easier for counties to share work, taking advantage of differences in caseload and staffing. **It is critical that any standards that are created be the same across the two state agencies.**

### Why Develop Business Process Standards?

Allowing a county to have significant discretion in designing its business processes makes sense for certain types of services, including those that have little cost or negative impact to a Coloradoan when they are delivered differently. However, inconsistent public and medical assistance program delivery can result in significant costs being placed on Colorado's most vulnerable citizens, such as a delay in the delivery of benefits, an incorrect eligibility decision, and potentially a need to repay benefits that were incorrectly issued to them by no fault of their own. Additionally, the lack of standardized and mandated shared technology systems prohibits the counties from easily sharing work, utilizing staff throughout the state, and ensuring that every customer is given the same standard of care and service regardless of where they live.

### What Will be Improved by Developing Business Process Standards?

All four areas of focus will be improved by developing business standards: program access, service delivery, administrative efficiency and cost effectiveness

### Example: In-Person Interview Standards

All counties must have a method to offer a same day interview to applicants who can't complete a telephone interview or who can't return to the office due to transportation difficulties.

Same day interviews may be conducted with a remote worker. The client can be interviewed by any eligibility worker, regardless of the county in which the worker works. The focus is a reduction in the potential for the client to miss a scheduled interview.

## Recommendation 1: What Does Success Look Like?

**The lack of business process standards has resulted in the uneven and unequitable delivery of public and medical assistance programs.**

**For clients**, this can potentially mean a different experience based on where they live, delays in the delivery of benefits, and incorrect eligibility determinations.

**For counties**, lack of shared business processes can lead to feelings of isolation when faced with high caseloads and low staffing levels.



### For clients...

Success looks like a consistent experience regardless of where they live in the state. Every client has the same access, gets the same answer, and a correct decision for their benefits.



### For counties...

Success looks like clear instructions and expectations from both state agencies on the types of minimum business processes are required and how their performance will be measured. It also identifies ways in which they can work together to best meet the business process requirements.



### For the state...

Success looks like the ability to consistently measure county performance in the delivery of services and track the customer experience.

# Recommendation 1: Implementation Plan

## Plan

### Build a project team

- Identify and build a diverse team of stakeholders.

### Identify standards

- Gather any existing business process standards and review
- Identify additional business process standards
- Identify technological standards that can or should be in place. Consider the existing technology used by the counties.

### Identify fiscal impacts

- Review both existing and additional business process and technology standards to determine any fiscal impacts to the state or counties.
- Determine the degree to which the costs will be allocated to the counties or absorbed by the state.

## Develop

### Write standards

- Working across all program areas, write detailed standards that clearly identify the minimum service requirements to achieve the standard. Identify where county discretion is permitted.

### Establish criteria and measures for evaluating performance

- Establish the criteria that the departments and counties can use to evaluate their performance against the standard.
- Determine measures for evaluating performance and how that data will be collected and reported.

### Test standards

- Pilot standards with a representative sample of counties to assess performance.
- Revise as necessary

## Execute

### Implement standards

### Assess performance against standards

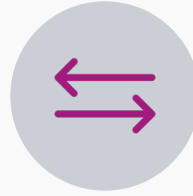
## Recommendation 1: Considerations



### Parties

**Drivers:** CDHS & HCPF

**Stakeholders:** CDHS, HCPF, county agencies, CHSDA, CCI



### Related Efforts

HCPF has started to implement minimum business delivery standards through the memo series.

State and federal regulations prescribe certain service delivery standards.



### Implementation Duration

1 to 2 years

Procurement of technology and by which agency may impact timelines as well as budget.

## Recommendation 1: Considerations



### Cost

#### Financial Cost:

- Low financial cost to establish business process standards.
- Medium financial cost to procure technology.
- Cost may be shared by the state and county or assumed solely by either party.

**Cost Savings:** Assume high cost savings due to implementation of high performing business processes, which will reduce administrative costs. Also reduced administrative costs at the state in having to track and account for differing processes when analyzing data.



### Policy

**State Legislative Changes:** None

**Federal Constraints:** Business process standards must comply with federal regulations.



## Recommendation 1: Benchmarks

There are no new metrics for tracking success of this recommendation. The state should utilize existing metrics (timeliness, customer satisfaction, etc.) to measure success. Much of the work for this recommendation should be focused on the planning and development phases of the implementation phase. The stakeholders should concurrently develop metrics in these phases.



## **Recommendation 2: Make Work Accessible and Portable**

## Recommendation 2: Make Work Accessible and Portable

Colorado should implement a **single statewide document and work management system**. This combined system will improve both the customer experience and allow counties to better view and manage their work.

Additionally, it will give Colorado future possibilities to make work portable, allowing the state and counties to move work around in a dynamic manner. The state can also consider implementing a single appointment system, which would allow interviews to be more easily viewed, tracked, and shared statewide.

The implementation of a statewide work management system is currently underway. It is critical that this system include a statewide document management system as well. Most critically, it is essential that the state makes **adoption and usage of the single system mandatory for all counties**. It is also critical that HCPF and CDHS be given funding from the General Assembly to implement this recommendation.



### Why One Document and Work Management System?

A single statewide document management system and work management system is a **critical component of administering public and medical assistance programs regardless of whether the programs are state- or county- administered**.

These systems are essential given increased caseloads, the fact that clients frequently move, and the shift to a remote work environment. Having such a system allows for work to become portable and compatible across counties, maximizing efficiency in resources. Failure to have a single system can adversely impact the customer experience and program access.

### What Will be Improved by Implementing One Document and Work Management System?

All four areas of focus will be improved by developing service delivery standards: program access, service delivery, administrative efficiency and cost effectiveness.

## Recommendation 2: What Does Success Look Like?

**Currently, the lack of a single, statewide document and work management system is frustrating to clients and eligibility workers.**

**For clients,** this can potentially mean increased administrative steps and burden if they move to another county and must resubmit their paperwork.

**For eligibility workers,** this can mean having trouble accessing client files, and information, and the inability to provide a quality level of service.



### For clients...

Success look like reduced administrative burden for clients (i.e., do not need to resubmit documentation or reapply in a different county).



### For counties...

Success looks like the ability for eligibility workers to access client files and documentation with ease; the ability to coordinate with other counties with ease; and the ability to process cases timely and accurately with a system that supports them to stay organized.



### For the state...

Success looks like the ability to gauge workload and distribution across counties; the ability to move work around dynamically, as needed; one, central system that will support workers statewide to process cases timely and accurately.

## Recommendation 2: Implementation Plan

### Plan

#### Build a project team

- Identify and build a diverse team of state and county stakeholders.

#### Identify system requirements

- Establish tools to support requirements gathering.
- Gather technical requirements and desired functionality. This should include collecting input from all levels of county staff and various state staff positions.

#### Review requirements

- Review the compiled requirements and desired functionality. Risks, dependencies and limitations should be included in this discussion.

#### Determine ownership

- Determine ownership of the system, which includes ongoing maintenance.

### Develop

#### Decide on the “right” platform

- Determine if the state should procure a new system entirely or if there is sufficient opportunity to leverage and enhance existing systems further before expanding to the entire state.
- Considerations should include at a minimum: budget/costs, procurement and development timelines, requirements (i.e., data migration) etc.

#### Develop budget request

- Craft the necessary budget request to secure the funding needed for both initial implementation and ongoing maintenance.

### Implement

#### Build or procure the system

- Procure or build the system.

#### User testing

- Perform user testing with state and county staff using either new or existing processes that are in place for CBMS.

#### Training

- Develop and facilitate training to all staff.

#### Rollout

- Establish a date by when any data from existing county systems needs to be integrated
- Establish a date by when existing county systems should be retired.

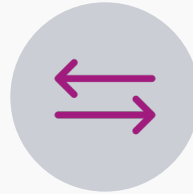
# Recommendation 2: Considerations



## Parties

**Driver:** CDHS & HCPF

**Stakeholders:** Counties



## Related Efforts

State is currently beginning to implement a single work management system and replacing the current Electronic Document Management System.

A third of counties use a homegrown WMS, which could help provide ideas and functionality for a statewide system

Utilize existing Joint Agency Interoperability (JAI)



## Implementation Duration

2-3 years to implement statewide

## Recommendation 2: Considerations



### Cost

**Financial Costs:** Medium financial cost that will vary depending on if a new system will be procured or if the state will continue with a home-built system. Costs can range from \$1.6 M to \$2.25 M for initial procurement.<sup>1</sup>

**Cost Savings:** Counties will experience cost savings from having to procure and maintain their own systems. Counties and the state will experience cost benefits from having a single system that allows for them to track work, which can translate to reduced administrative costs and more efficient eligibility determinations.



### Policy

**State Legislative Changes:** Potential legislative changes if the state needs to mandate the use of the system and needs that to be promulgated.

**Federal Constraints:** There are no federal constraints. There may be federal funding opportunities available to leverage.

## Recommendation 2: Benchmarks

Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
100% of counties are using the system	<ul style="list-style-type: none"> <li>Number of counties that have the implemented the system</li> </ul>	<ol style="list-style-type: none"> <li>Identify how you will collect the data</li> <li>Collect data at specific cadence</li> <li>Monitor progress at existing monitoring or state-level meetings</li> </ol>
100% of county eligibility workers are trained on the system	<ul style="list-style-type: none"> <li>Total number of county workers</li> <li>Number of county workers who have been trained</li> </ul>	<ol style="list-style-type: none"> <li>Identify how you will collect the data</li> <li>Collect data at specific cadence</li> <li>Monitor progress at existing monitoring or state-level meetings</li> </ol>
Worker satisfaction with system	<ul style="list-style-type: none"> <li>Answers from worker survey that gauge satisfaction with the system overall and with specific features</li> </ul>	<ol style="list-style-type: none"> <li>Administer and analyze a worker satisfaction survey</li> </ol>
Ease of use	<ul style="list-style-type: none"> <li>Questions that gauge work satisfaction with the system overall and with specific features</li> <li>Time records that measure the length of time for specific tasks within the system</li> </ul>	<ol style="list-style-type: none"> <li>Administer and analyze a worker satisfaction survey</li> <li>Administer and analyze a time study</li> </ol>





## **Recommendation 3: Improve Hiring and Retention Practices**

## Recommendation 3: Modernize and Customize Eligibility Worker Roles, Career Paths, and Compensation

One way that Colorado can improve its delivery of public and medical assistance programs is by improving the hiring and retention practices for eligibility workers. There are four inter-related recommendations that Colorado should focus on implementing in this area.

- Update classification from clerical to professional grade
- Create a series of positions to improve career ladders and recognize unique skillsets and job requirements
- Update pay ranges to promote statewide comparability
- Enable continuous recruitment and centralized online postings

### Why Modernize and Customize Roles, Career Paths, and Compensation?

This series of recommendations would address a number of challenges found as a part of the assessment process. Many counties are facing eligibility workforce shortages and are struggling to recruit. The average tenure of an eligibility worker is three years, which means that critical institutional knowledge is not being retained. Salaries appear to fall considerably below living wages in most counties depending on the family composition of the worker. We also heard anecdotally that workers move between counties based on pay and evolving hybrid workforce policies

### What will be improved by Modernizing and Customizing Roles, Career Paths, and Compensation?

- Increased job satisfaction through roles more tailored to employee preferences and skills.
- Increased retention and decreased turnover, along with savings on hiring, training, and other onboarding costs.
- Improved quality, accuracy, and timeliness of service delivery from an experienced and stable workforce.



## Recommendation 3: Sub-Recommendations

**1**

### Update job classification from administrative/clerical grade to professional grade

Currently, some counties have eligibility workers classified as professional positions, while others are classified as administrative and clerical. This recommendation proposes moving all eligibility positions into a professional classification to reflect the current complexity of their roles and required skillset. This change will become even more critical as the straightforward, less complex work is increasingly automated to require less worker interaction, while the work that requires human intervention will be increasingly complex. Examples of this dynamic include recommendations to improve PEAK included in this report, as well as the work that has been done to increase the ex parte renewal rate in Medicaid.

**2**

### Create a series of job descriptions to improve career ladders and recognize unique skillsets

Position customization would allow counties to recognize workers skilled in complex cases, with language skills such as Spanish, as well as defining primary duty location based on need, e.g., an in-office position to handle walk-in applications and interviews. Additionally, building in-person, hybrid, and remote standards into the job descriptions mitigates the need to harmonize county telework policies more broadly.

**3**

### Enable continuous recruitment and centralized online postings

If positions are standardized across counties, it could enable continuous recruitment and reduce the time to move from a vacancy to a posting. These positions could also be posted in a central location, such as on the HCPF and CDHS websites, and include which counties were currently hiring for which roles, linking to the county hiring website as well. This is intended to increase the number and diversity of qualified candidates.

**4**

### Review and update salaries to promote statewide comparability

Under this approach, jobs would have the same base pay rate across the state. However, there could also be two types of locality adjustment. The first would be a cost-of-living adjustment to recognize the vast differences between regions of the state. The second could be for under-resourced counties where it is particularly hard to recruit workers. This would create a system where an eligibility worker could afford to live in Eagle or Boulder County but would still provide an incentive for prospective workers in frontier counties.



## Recommendation 3: What Does Success Look Like?

**The challenges in hiring and retention impact all areas of county-administered programs.**

**For clients,** this can potentially mean a different experience based on where they live, delays in the delivery of benefits, and incorrect eligibility determinations.

**For counties,** this can mean an overextended workforce, higher turnover, and managers' time increasingly pulled into filling vacancies, all of which contributes to a challenging work environment.



### For clients...

Success looks like an improved customer service through a workforce that is more experienced, stable, and has roles increasingly tailored to their skills and preferences.



### For counties...

Success looks like higher employee satisfaction, increased ability to hire and retain talented employees, and fewer vacancy-driven backlogs.



### For the state...

Success looks like compliance with federal service standards, the ability to partner with the county teams to successfully lift policy and operational initiatives, and increased feedback from and collaboration with an experienced county workforce.

## Recommendation 3: Implementation Plan

### Plan

#### Build a project team

- Identify and build a diverse team of stakeholders.

#### Engage county and state leadership

- Get feedback on proposals and agreement on broad parameters.

#### Engage county HR teams

- Identify technical and HR policy obstacles at the state level, options to address them and/or tweaks to the approach to make it feasible.

#### Align on conceptual approach

- Get consensus from stakeholders and decision-makers on the proposal and key attributes.

#### Develop county staffing and pay plan

- Identify what the new base levels of pay should be, as well as how positions may change and any position gaps that would need to be a priority for filling vacancies.

### Develop

#### Build the budget request

- Based on new staffing and pay plan.
- Include outyear savings estimates to provide context.

#### Request and respond to budget

- Have phased and reduced scope approaches developed and estimated to support negotiations as needed.

#### Develop updated position descriptions

- Draft, vet, and approve PDs so implementation can begin if/when budget is approved.
- Begin discussions with current staff on overall plan as well as opportunities for their role to evolve.

#### Develop implementation plan

- Map out an implementation approach with roles and responsibilities

### Execute

#### Reclassify current employees according to new positions

- Based on identified skillsets and preferences

#### New rates of pay take effect

- Timing can be calibrated according to available year one funding while the full cost will take effect in year two.

#### Begin posting updated positions in central location

- Leverage opportunities to share information on vacancies to a broader audience.

#### Monitor tenure, vacancy rate, and other key metrics to identify changes in trend and outcomes

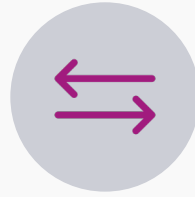
# Recommendation 3: Considerations



## Parties

**Drivers:** CDHS & HCPF & county managers

**Stakeholders:** Board of County Commissioners, county HR teams, and field staff. County and state budget offices and General Assembly.



## Related Efforts

There could be increased efficiencies if this effort were coupled with work-sharing across counties (and its technological requirements). For example, the easier it is for workers with second-language skills to work with applicants of that language, regardless of their county of application, the easier it will be to improve outcomes and drive increased savings in the translation contract.

Efforts to improve the training and onboarding of eligibility workers will further contribute to a productive, stable, and satisfied workforce.



## Implementation Duration

2-3 years to implement statewide, including the state budget cycle

# Recommendation 3: Considerations



## Cost

**Financial Cost:** Medium to high financial cost, which is dependent on the extent to which the change in classification and customization increases pay and the extent of additional funds appropriated by the General Assembly.

**Cost Savings:** High cost savings associated with reduced turnover and processing efficiency and accuracy.



## Policy

**State Legislative Changes:** Unlikely but could potentially require HR policy changes or accommodations at the county level.

**Federal Constraints:** Federal administrative funding estimates should be incorporated into broader budget planning



The Colorado Department of Personnel and Administration may be able to offer technical assistance with this approach, even though the positions would remain with the counties.

## Recommendation 3: Benchmarks

Sub-Rec	Benchmark	Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
1	Number of counties that have eligibility workers classified as administrative positions	Increase in percentage of counties that have re-classified eligibility workers to professional classification by [established date]	Classification determination for EWs for each county	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>
2	None - dependent on county agreement or coalition building	N/A	N/A	N/A
3	Eligibility workers salary by county	Percentage of eligibility workforce that has moved to the new pay standard	Salary ranges by county	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>
3	Eligibility workers staffing levels by county	Percentage of eligibility workforce within each locality adjustment	Staffing levels by county	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>



## Recommendation 3: Benchmarks

Sub-Rec	Benchmark	Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
4	None - dependent on county HR policies	N/A	N/A	N/A
General	Eligibility workers vacancy rate by county	Decrease in number of vacancies by county and locality	Vacancy rate by locality	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>
General	Time to fill an eligibility worker vacancy by county	Decrease in time to fill by county and locality	Length of time to fill by county and by position	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>
General	Average and median tenure for eligibility workers by county	Increase in median tenure	Tenure by county	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>



**Recommendation 4: Optimize PEAK**

## Recommendation 4: Optimize PEAK

### Current status of PEAK:

Colorado should make changes to PEAK to **improve how both clients and eligibility workers interact with the platform**. The state has already made numerous changes to improve PEAK's functionality and accommodate both federal and state mandates, but the overall impact of those changes has reportedly been negative, particularly for workers. By implementing a new series of recommended changes, and exploring additional improvements, PEAK can become an even more effective tool in providing seamless access to benefits statewide.

**Recommended changes to PEAK include a mix of updates to existing features, and the implementation of new features in collaboration with stakeholders.** Another more intensive approach may be to completely redesign or overhaul the system, which would allow the state to better map and integrate PEAK into CBMS and the overall eligibility workflow. If changes are made to PEAK, the state may consider go through a rebranding effort to address the negative views of the system shared by both clients and staff alike.

### Why is a Fully Optimized PEAK Crucial to Colorado's Success?

An online system like PEAK can be a tremendous help for both eligibility workers and clients. However, PEAK's current functionality is not designed in a way that is helpful to either party. As a result, **both clients and workers are frustrated by the system and do not find it useful.**



## Recommendation 4: Sub-Recommendations

The following five recommendations address the **most common pain points identified through our assessment by both clients and eligibility workers**. Addressing these five areas will exponentially improve the PEAK experience for all parties. If resources allow, a more in-depth overhaul of PEAK in conjunction with stakeholders would yield further increases in productivity and benefits processing.

**1**

### Restrict the Type of Changes Clients Can Make

Clients can currently edit and delete information that was entered either by a worker or verified through an interface. Interfaces, or information that come directly from another state system, should never be modified or deleted because they come directly from that other system and reflect true and factual information. When mandatory information is edited or deleted by a client, the information needs to be recreated, which requires significant time and effort by the worker. Restricting client changes to fields that do not require worker verification (such as an email or phone number change) will save workers time and prevent a delay in benefits.

**2**

### Restrict the Frequency of Changes Allowed by Clients

Currently there is no restriction on the number of times that clients can submit the *same* change, which results in multiple change report forms for a single edit. By providing a receipt for submitted changes, clients can have peace of mind knowing that their edits are pending verification by an eligibility worker.

**3**

### Simplify Change Reporting

The current change report form generated by PEAK does not call out the actual changes that clients made. A report that highlights just the new additions or edits from clients would speed up the change verification process and address the change report backlog that currently exists in the state.



## Recommendation 4: Sub-Recommendations

### 4 Include Clear Navigational Language

Adding clear navigational language for clients during the application and recertification process will simplify the process for clients and reduce eligibility workers time to rework the information. Client confusion or exhaustion can lead to incomplete applications. Navigational language at each step of the process will lead to an increased number of complete applications and recertifications. This will address the high number of incorrectly expedited applications the state is currently seeing.

### 5 Aligning PEAK with Paper Forms

Aligning the paper and PEAK application and recertification methods will improve data entry and processing efficiency as eligibility staff will have an easier time moving between two methods found in their daily workflow.

### 6 Train Staff on PEAK

Eligibility workers currently don't receive any training on PEAK, which limits their ability to provide help to clients. The state should provide PEAK training to eligibility workers, including creating a sandbox environment so that workers can directly interact with the system in the same way as clients. Providing training will ensure that staff are able to address client questions regarding the PEAK platform and to better walk clients through common issues, thereby increasing the client's technical knowledge and increase the number of correct and complete submissions.

## Recommendation 4: What Does Success Look Like?

**Currently, the shortcomings of PEAK are leading to worker frustration and client confusion.**

**For clients,** this is leading to a high volume of incomplete applications, duplicate change reports, and contact to county offices seeking help with PEAK.

**For eligibility workers,** aspects of PEAK are leading to increased time spent working cases, delaying benefits, and adding additional tasks to their workflow.



### For clients...

Success looks like an easy digital experience where clients understand what they can and can't do within the system, the time frames for when digital information is processed, and that the platform is failsafe regarding known frequent user errors.



### For counties...

Success looks like less time spent fixing client caused errors and finding information on long and unwieldy documents. It also looks like staff celebrating that the technology in their workflow has improved their efficiency instead of slowing them down.



### For the state...

Success looks like faster processing time for benefits, staff that feel supported in their workflow, and clients who move through the process faster and with less confusion.

## Recommendation 4: Implementation Plan

### Plan

#### Build a project team

- Identify and build a diverse team of stakeholders.

#### Identify components of features

- Flesh out the required features and functionality.
- Utilize stakeholder workgroups with clients and county workers and supervisors to determine the specific changes and improvements that are needed.

#### Obtain estimate

- Utilize the existing estimate process to get an estimate of the various changes
- Determine the amount of funding needed

#### Outline priorities

- Based on available funding, determine which features will be prioritized if cost is a restrictor to the project scope.

### Develop

#### Write business requirement documents

- Prepare the BRD with the necessary functionality.
- Establish criteria for evaluating functionality

#### Review technical design documents

- Collectively review the TDD and ensure that it meets all requirements.

#### Test Features

- Test the features using the current test process utilized for CBMS.

### Execute

#### Train workers

- Develop and facilitate training to all workers on PEAK updates
- Develop and facilitate training to all workers on the client side of PEAK

#### Announce optimized PEAK

- Rebrand PEAK
- Conduct marketing campaign on rebranded PEAK
- Develop standing methods for collecting and documenting feedback and suggestions on future changes for PEAK.

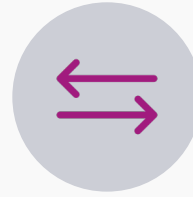
## Recommendation 4: Considerations



### Parties

**Driver:** CDHS & HCPF

**Stakeholders:** CDHS, HCPF, eligibility workers, and clients



### Related Efforts

Current work with Code for America

Statewide document and work management system implementation

PEAK team has an annual allotment of 25,000 hours to make changes within the system



### Implementation Duration

1-2 years to rollout, continuous upkeep and modifications are recommended



## Recommendation 4: Considerations



### Cost

**Financial Cost:** For changes within the existing PEAK system there is a low financial cost, estimated to be less than \$1,000,000. The cost would be substantially higher if a new system were to be procured or built.

**Cost Savings:** High cost savings due to reduced inaccurate information and work coming into the counties. This will translate to more efficiency by workers, which will allow them to determine eligibility for more households.



### Policy

**State Legislative Changes:** None

**Federal Constraints:** Federal requirements around program access and electronic applications and document submission.

## Recommendation 4: Benchmarks

Sub-Rec	Benchmark	Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
1	Number of changes made in PEAK that do not go through real time eligibility (RTE)	Reduction in the amount of time to process a client generated change	Length of time to process a client generated change by type/category of change	Administer and analyze a time study
1	Number of changes made in PEAK that are not RTE	Reduction in the number of changes that need to be uploaded versus RTE	Number of changes that go through RTE	Identify if currently system reports track this data
2	Frequency with which the same household submits a change on the same day	Reduction in the frequency with which the same household submits a change on the same day	<ul style="list-style-type: none"> <li>Number of changes that are submitted on the same day by the same household</li> <li>Number of instances when the same change was reported</li> </ul>	Identify if currently system reports track this data. If not, work with counties to obtain a manual count over a specific period of time
4	Number of applications that are considered complete when submitted	Increase in the percentage of applications that are considered complete when submitted	Number of applications that are not considered complete	Identify if currently system reports track this data. If not, work with counties to obtain a manual count over a specific period of time
4	Number of recertifications that are considered complete when submitted	Increase in the percentage of recertifications that are considered complete when submitted	Number of recertifications that are not considered complete	Identify if currently system reports track this data. If not, work with counties to obtain a manual count over a specific period of time

## Recommendation 4: Benchmarks

Sub-Rec	Benchmark	Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
4	Number of calls coming into PEAK help desk	Decrease in the number of calls coming into the PEAK desk asking for help with completing the application or recertification	Number of calls coming into PEAK help desk	Identify if currently system reports track this data. If not, create report to measure data
4	Drop off rate by page in the application flow	Reduction in the overall drop off rate prior to submission	Drop off rate by page in the application flow	Identify if currently system reports track this data. If not, create report to measure data
4	Drop off rate by page in the recertification flow	Reduction in the overall drop off rate prior to submission	Drop off rate by page in the recertification flow	Identify if currently system reports track this data. If not, create report to measure data
4	Current rating in app store	Increase in the app store rating	Rating in app store	Collect rating from PEAK team
4	Number of PEAK applications that are classified as expedited food assistance	Reduction in the number of PEAK applications that are incorrectly classified as expedited food assistance	Number of PEAK applications that are incorrectly identified as expedited	Identify if currently system reports track this data. If not, work with counties to obtain a manual count over a specific period of time
6	None	Number of eligibility workers who have completed PEAK training	<ul style="list-style-type: none"> <li>Total number of eligibility workers</li> <li>Number of workers that have completed PEAK training</li> </ul>	Pull report from CoLearn LMS

## **Recommendation 5: Improve Policy Documentation and Dissemination**

## Recommendation 5: Improve Policy Documentation and Dissemination

Policy is the backbone of Colorado's public and medical assistance programs and guides all decisions that workers make each day. At present, policies/regulations and training materials live in different locations, the process to change is different between CDHS and HCPF and is not overly transparent, and the regulations are difficult to understand due to the language used. Based on this, **the state should improve the overall policy documentation and dissemination process.**

### Why Improve Policy Documentation and Dissemination?

All levels of county staff rely on Colorado's administrative regulations to guide their work and answer questions. However, the administrative regulations are written in a very formal and legal voice and each program area has their own set of regulations, which may be misaligned (either CDHS or across CDHS and HCPF). Failing to have a single location for all regulations, as well as misaligned regulations that are not written in a straightforward way can negatively impact clients.

### What Will be Improved by Improving Policy Documentation and Dissemination?

All four areas of focus will be improved by developing service delivery standards: program access, service delivery, administrative efficiency and cost effectiveness.

### What Workers Said about Policy Documentation and Dissemination:

- "I don't know how exactly to say this but **make things more black and white**. The rules are not always clear, and we do not always know how to apply the rule correctly."
- "I think that all of policy is difficult for clients. Because it's written by attorneys, **it's all incredibly difficult and complex language**. Long, complex sentences with a bunch of terminology that is unfamiliar. We deal with a lot of clients who have a lower reading level, so having a clearer way of stating things would be very beneficial to them."
- "I would **make policy clearer to understand** and maybe a little more black-and-white so that there isn't as much room for interpretation between eligibility workers/counties/state."
- "Having rules/regs in a **format that allows workers to process more effectively**." *(When asked what they would change if they were given a magic wand)*
- "Program policy that is **easier to read and understand**." *(When asked what they would change if they were given a magic wand)*

## Recommendation 5: Sub-Recommendations

**1**

### Align Common Policy Requirements, Where Possible

Aligning policy requirements, where possible given federal and state constraints or limitations, will be a major improvement for both clients and counties. Examples of elements that fall under this recommendation include interview requirements, change reporting and verification requirements. The West Virginia Department of Health & Human Resources has produced an [Income Maintenance Manual](#) that has determined areas of commonality in the SNAP, Medicaid and TANF (WV WORKS) programs as well as designating topics that are program-specific.

**2**

### Align the Process Used to Modify Regulations Across Both Departments

CDHS and HCPF currently update regulations in a different way and these changes are not easily identified in the administrative regulations. The state should implement change notices, which document the reason behind policy changes, provide an overview of the change, and clearly document the change. An example of this can be found in [Virginia's](#) shared manual which includes the regulations and links to transmittals with updates to policy, on the same home page. [North Carolina](#) and [North Dakota's](#) manual also include examples of change notices as well as show how the state has centralized changes, administrative letters, and regulations in one manual.

**3**

### Create a Policy Collaboration Team

Colorado should create a joint Policy Collaboration Team who would be responsible for maintaining the policy manual and also would look at all proposed regulation changes to identify if they are aligned. The team would be composed of members from CDHS and HCPF as well as county representatives and other stakeholders. Arizona instituted a similar team in order to update their [new CNAP manual](#).



## Recommendation 5: Sub-Recommendations

### 4

#### Create a Single Policy Manual

Having a single policy manual will serve both clients and county staff as being the lone location to find all public and medical assistance policies. This manual should:

- a. Use clear and plain language so that the reader can easily and quickly understand it.
- b. Take advantage of available formatting such as tables, charts and visual aids such as highlighting examples and reminders to help the reader better comprehend the information. This would also include identifying the dates of a policy's revision.
- c. Have multiple methods for searching.
- d. Utilize hyperlinks to allow the reader to move between relevant sections more easily. Hyperlinks can also be to reference documents, such as training aids and policy clarification memos would assist workers in their understanding of the topic.
- e. Include a glossary and table of acronyms.

An example of policy manual that achieves these goals is [Oregon's Programs Eligibility Notebook](#). Wisconsin's [FoodShare](#) and [BadgerCare Plus](#) policy handbooks are prime examples of enhanced search functionality.

### 5

#### Establish a Central Repository for All Resources

Several states have created online portals or repositories for eligibility workers that house their policy manuals, policy updates change notices, training materials, and answers to questions. The repository may also include a means for the counties to submit policy questions to the state. Minnesota hosts [County Link](#), a website site for all the policy-related resources available to its counties.



## Recommendation 5: What Does Success Look Like?

**Policy that is unclear, difficult to navigate, and hard to interpret makes the delivery of public and medical assistance programs more challenging.**

**For clients**, not understanding the policies being applied to them can lead to frustration and confusion, sometimes causing them to submit additional and unnecessary documents.

**For counties**, this leads to inconsistency in the application of policy and a greater prospect of program errors.



### For clients...

Success looks like a single place to go to for finding policy questions across the variety of programs that they household may be getting. This place gives clear answers that help the client understand what they need to do or why certain actions are being taken.



### For counties...

Success looks like a single location that houses all policy, training materials, policy questions, and memos. This location has a smooth design, is easy to navigate, and has plain language with examples.



### For the state...

Success looks like the creation of a single team to produce and maintain a living document that supports both clients and staff. It is also a shared commitment to make changes in a consistent way to smooth out potential confusion.



## Recommendation 5: Implementation Plan

### Plan

#### Build a project team

- Identify and build a diverse team of stakeholders.

#### Map out current change processes and Department requirements

- Identify the current processes used to update policy and the reasoning for those processes
- Identify which processes can be aligned
- Map out the current communication process for policy changes and how they can be aligned

#### Identify common policy requirements

- Utilize the CO ABP spreadsheet to identify common policies
- Identify which policies can be aligned based on federal and state limitations

### Develop

#### Develop budget request

- Identify if the creation of the single policy manual and central repository will be completed “in-house” or by an outside contractor.
- Identify the number of hours needed and personnel needed if the projects will be done “in-house”. This includes both initial development and ongoing maintenance.
- Some costs are human, and some are technology.

#### Submit budget request

#### Create a Policy Collaboration Team

- Create a policy collaboration team comprised of staff from both state departments, the counties, and the Staff Development Division.

### Execute

#### Create integrated policy manual

- Develop manual
- Test manual

#### Establish central repository

- Pull together all necessary resources
- Create organization for the repository
- Establish methods for searching
- Identify time frame for moving existing content to new repository
- Identify date by when previous locations will be decommissioned.

#### Develop shared process for policy changes

- Establish a uniform policy update process that makes it easier for counties to understand policy changes



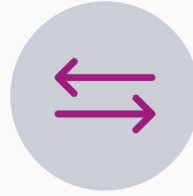
# Recommendation 5: Considerations



## Parties

**Driver:** CDHS and HCPF

**Stakeholders:** CDHS, HCPF, SDD, Counties



## Related Efforts

There are numerous examples of excellent manuals and online repositories that will help reduce the amount of time needed to create the bones of the manual.

As a part of this assessment, the vendor created a comprehensive spreadsheet of common policies across the CBMS programs. This will reduce the amount of initial work needed to find these common policies



## Implementation Duration

12 – 24 months

## Recommendation 5: Considerations



### Cost

**Financial Cost:** Medium financial cost that is dependent on if the Departments need additional staff to meet the requirements, even if a contractor is used for the initial development.

**Cost Savings:** Assumed high cost savings resulting from fewer inaccurate eligibility decisions and improved efficiency in case processing. The latter created from policy answers that are easier to find and understand. For state staff, cost savings are from reduced questions to the policy email boxes.



### Policy

**State Legislative Changes:** None

**Federal Constraints:** Federal constraints will exist in the alignment of certain policies. There are no federal constraints around creating an integrated manual or having a single online repository for documentation.

## Recommendation 5: Benchmarks

Sub-Rec	Benchmark	Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
1	None	Increase in the number of clicks/visits to the manual	Webpage click data	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>
2	None	Increase in the number of clicks/visits to the central repository	Webpage click data	<ol style="list-style-type: none"> <li>1. Identify mechanism to collect this data</li> <li>2. Schedule collection</li> <li>3. Analyze data to measure success</li> </ol>
1, 2	Current worker satisfaction with interpreting policy	Increase in worker satisfaction with interpreting policy	Worker satisfaction	<ol style="list-style-type: none"> <li>1. Administer and analyze worker survey</li> </ol>
1, 5	Current worker satisfaction with locating policy	Increase in worker satisfaction with locating policy	Worker satisfaction	<ol style="list-style-type: none"> <li>1. Administer and analyze worker survey</li> </ol>
1, 2, 3	Number of emails received into each program area email box	Decrease in the number of emails that require a simple answer	Count of emails received Classification of emails to allow for assessment	<ol style="list-style-type: none"> <li>1. Categorize incoming emails for a specific period of time</li> <li>2. Assess the categories to measure success</li> </ol>

**Recommendation 6: Continue with  
Improvements to the Current Training  
Model**

## Recommendation 6: Continue Improving the Current Training Model

Colorado currently has a quasi-centralized training model for CBMS programs, where the state develops the training content and said content may be delivered by a state trainer or a county trainer who has been certified. This leads to counties delivering the training differently. The inconsistency is largely the result of whether a county has a trainer as part of its staff. Counties reported taking widely varied approaches to the order of programs staff learnt, whether a county utilized a nesting period with new staff and length of time someone would be nesting. **Variation to approach has resulted in work performance differences in new employee’ skill level.**

### Why Continue with Improvements to the Current Training Model?

While the State’s Staff Development Division (SDD) creates standardized content for the onboarding of new staff, the process of training and nesting occurs in an inconsistent manner across counties. The inconsistency is largely the result of whether a county has a trainer as part of its staff. Counties reported taking widely varied approaches to the order of programs staff learnt, whether a county utilized a nesting period with new staff and length of time someone would be nesting. Variation to approach has resulted in work performance differences in new employee’ skill level.

### What Will be Enhanced by Continuing to Improving the Current Training Model?

All four areas of focus will be improved by developing service delivery standards: program access, service delivery, administrative efficiency and cost effectiveness.



## Recommendation 6: Sub-Recommendations

### 1 Modernize the Sandbox (training) Environment

The sandbox (training) environment should match the functionality of the production system. New workers should be able practice processing of applications for households that previously received benefits as well as ongoing work (recertifications and changes during the certification period). Ideally, the system should allow for staff to practice with interfaces.

### 2 Integrate Complex Case Scenarios

New worker training should incorporate more complex case scenarios that are similar to those that a worker will see when they leave training. This includes how to read and act on data that interfaces into CBMS. occur.

### 3 Implement Nesting Statewide

Nesting periods, or the length of time a trainee spends in nesting, should be standardized and facilitated by state staff. Additionally, the work/tasks that staff complete while in nesting should be standardized to assist with creating a training environment that produces knowledgeable, efficient staff, quickly.

### 4 Transition to State-Delivered Training

The state is ultimately responsible for administering the public and medical assistance programs and part of this administration includes ensuring that workers are trained equitably and consistently.

## Recommendation 6: What Does Success Look Like?

**The variation counties take to training and nesting has resulted in work performance differences in new employees' skill level.**

**For clients,** this can mean a different experience based on which county they reside in. This may result in benefit issuance delays or interruptions and/or inaccuracy of casework.

**For counties,** this can mean it takes more time to have an employee be well trained across all programs.



### For clients...

Success looks like confidence in their Eligibility Technician and an understanding that regardless of which County they reside in, they'll work with someone who is knowledgeable, efficient and well-informed.



### For counties...

Success looks like being able to integrate new eligibility workers into the workforce immediately after training concludes. Additionally, having well trained staff will allow supervisors to prioritize their traditional supervisory responsibilities.



### For the state...

Success looks like a workforce that has been consistently trained, allowing them to consistently apply policy regardless of where they work. As a result, there is reduced risk of sanctions or penalties related to timeliness or accuracy.



## Recommendation 6: Implementation Plan

### Plan

#### Build a project team

- Identify and build a diverse team of stakeholders.

#### Identify additional sandbox enhancements

- Determine what additional sandbox enhancements are needed in order to fully match the sandbox environment to the production environment

### Develop

#### Develop nesting standard

- Develop the standards for nesting that all counties will follow. Standards should include how progress will be assessed, who can provide or supervise nesting, time frames for reviewing working, and how nesting will be provided.
- Create strategies for how nesting can be provided in counties that have limited or no infrastructure (limited staff, etc.). This may include consortia or virtual nesting provided by the SDD

#### Establish checklist for types of case actions

- Borrowing from apprenticeship models, create a checklist for each program that identifies the specific types of case actions or activities that a worker must have seen and successfully completed in order to move on

#### Create case scenarios

- Create new case scenarios that will take advantage of the system enhancements.

### Execute

#### Establish staffing needs

- Determine how many SDD trainers are needed to provide timely and sufficient training to all new workers.
- Create schedule for frequency and cadence of trainings
- Identify how additional training positions will be funded (new dollars, reallocation of county dollars to the state, etc.)
- Develop budget request, if necessary

#### Determine role or responsibilities of county trainers

- Determine what role or responsibilities the county trainers will retain.
- Create standards for county training

#### Update nesting standard, as appropriate

#### Develop timeline for transition



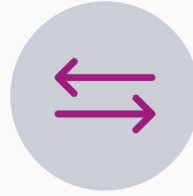
## Recommendation 6: Considerations



### Parties

**Drivers:** CDHS and HCPF

**Stakeholders:** CDHS, HCPF, SDD, Counties



### Related Efforts

The Staff Development Division has recently made several changes to its training model. While transitioning training from the counties to the state will be a significant change, many of the secondary recommendations will serve as enhancements to the model they're currently utilizing.



### Implementation Duration

1-2 years

## Recommendation 6: Considerations



### Cost

**Financial Cost:** Medium financial cost due to the need for additional staff at the SDD if all training is to shift to being facilitated by them. Additional costs would include support for nesting in those counties that lack staff who can sufficiently provide this support.

**Cost Savings:** High cost savings as new workers are receiving consistent training that is complete and comprehensive for both policy and system requirements. New staff are able to transition from the training room to a supportive nesting environment, which encourages deeper understanding of the programs. When staff transition to the floor, they are making accurate eligibility determinations and are helping more households more quickly than in the current state.



### Policy

**State Legislative Changes:** None

**Federal Constraints:** None

## Recommendation 6: Benchmarks

Sub-Rec	Benchmark	Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
1	Number of staff that are trained by the SDD	Increase in the number of staff trained by the SDD	Number of staff that are trained by the SDD	<ol style="list-style-type: none"> <li>1. Pull report from CoLearn LMS</li> </ol>
1	Number of audit findings	Decrease in the number of audit findings that are caused by incorrect policy application or interpretation	Number of audit findings by program area that were caused by incorrect policy application or interpretation	<ol style="list-style-type: none"> <li>1. Identify report needed to track audit findings</li> <li>2. Collect data at specific cadence</li> <li>3. Monitor progress at existing monitoring or state-level meetings</li> </ol>
1	Number of client complaints	Decrease in the number of client complaints that are caused by incorrect policy application or interpretation	Number of client complaints by program area that were caused by incorrect policy application or interpretation	<ol style="list-style-type: none"> <li>1. Identify report needed to track audit findings</li> <li>2. Collect data at specific cadence</li> <li>3. Monitor progress at existing monitoring or state-level meetings</li> </ol>
2	Number of counties providing nesting	Increase in number of counties providing nesting	Count of counties that are providing nesting	<ol style="list-style-type: none"> <li>1. Identify report needed to track audit findings</li> <li>2. Collect data at specific cadence</li> <li>3. Monitor progress at existing monitoring or state-level meetings</li> </ol>



## Recommendation 6: Benchmarks

Sub-Rec	Benchmark	Metric to Assess Success	Data Needed to Track and Monitor Success	Approach to track and monitor success
2	Nesting duration by county and corresponding accuracy rates	Standardization of nesting time frames by county	Duration of nesting by county by program	<ol style="list-style-type: none"> <li>1. Identify report needed to track audit findings</li> <li>2. Collect data at specific cadence</li> <li>3. Monitor progress at existing monitoring or state-level meetings</li> </ol>
2	Nesting duration by county and corresponding accuracy rates	Increase in the quality of nesting	<ul style="list-style-type: none"> <li>• Decrease in the amount of time needed for a new worker to move out of nesting</li> <li>• Increase in the amount of work new workers can process at 6, 9, and 12 months after leaving training</li> </ul>	<ol style="list-style-type: none"> <li>1. Identify report needed to track audit findings</li> <li>2. Collect data at specific cadence</li> <li>3. Monitor progress at existing monitoring or state-level meetings</li> </ol>
General	Eligibility worker turnover/vacancy rate	Decrease in the turnover/vacancy rate	Vacancy rate Tenure prior to exit	<ol style="list-style-type: none"> <li>1. Identify how to collect data</li> <li>2. Collect data at specific cadence</li> <li>3. Monitor progress at existing monitoring or state-level meetings</li> </ol>



The background is a solid blue color. It features several abstract geometric shapes, including squares and rounded rectangles, in various shades of blue and white. Some shapes are solid, while others are outlined. They are scattered across the page, with a higher concentration on the left side. The text 'Quick Wins' is positioned in the lower-left quadrant.

# Quick Wins

## Quick Win 1: Create Opportunities for State and County Collaboration

The counties and states depend on one another to deliver public and medical assistance benefits to Colorado residents. Survey results showed that there are some areas where collaboration between the two groups could be strengthened. Specific opportunities for collaboration include:

### Improving the Process for Responding to Policy and Case Questions

A major way for counties to get help is by emailing the state with questions. The county may need to email multiple program areas for a single case, with each program area providing their own response.

Specific improvements in this area include:

- a. Establishing expectations for counties on how to document what steps were taken to attempt to locate the answer they're seeking guidance on.
- b. Establishing expectations for state responses so that they are helpful. Responses should be comprehensive and provide examples of how to apply policy to the case, rather than responding with rule.
- c. Requiring that the program areas coordinate their responses when policies are misaligned.

### Holding Policy & System Case Review Meetings

The state should hold recurring meetings where they staff complex cases or cases where policies or system data entry requirements are misaligned. **These cases are separate from quality assurance and control cases and would instead come from the policy and system questions that come from the counties to the state email inboxes.** The findings from these meetings should be disseminated to county staff and should also be used to adjust policy and data entry requirements, where possible. This meeting could include representatives from the county to involve all stakeholders.

## Quick Win 2: Increase Communication and Collaboration Between CDHS and HCPF

It is critical that HCPF and CDHS communicate and collaborate between one another given their oversight role of Colorado's public and medical assistance programs. In a state with a prominent culture of local control across 64 different counties who must administer all programs with no ability to silo, effective collaboration and partnership at the state agency level is paramount.

Opportunities for enhanced communication and collaboration between CDHS and HCPF include:

### Holding Regular Meetings with Representatives from Both Agencies

CDHS and HCPF should meet on a regular cadence, such as biweekly, and discuss the following:

- a. Current challenges/issues across programs
- b. Upcoming changes and impacts on all programs and operations
- c. Timeliness and accuracy updates
- d. Review of the current workload across programs

### Exploring Strategies for How to Best Engage and Communicate with the Counties

There is an opportunity for CDHS and HCPF to learn from one another on what communication practices are effective and working well and where there are opportunities to learn from one



## Quick Win 3: Align Administrative Requirements

The three program areas should align as much as possible on the administrative requirements that are mandated to the county agencies. It is inefficient for the counties to have multiple sets of requirements on the same type of task or action. There are several specific areas where alignment should occur, though this is not an exhaustive list.

### General Administrative Requirements

1. Management evaluations – Structure, frequency, duration, sample of cases, report, and follow-up requirements
2. Quality assurance requirements – Sample (including multiple programs), reporting requirements to the state, required forms to be used, frequency
3. Reports – detail provided in reports should be the same across all program areas and in the same format

### State Quality Assurance/Quality Control Processes

The state should align the state quality assurance/quality control process and elements that are reviewed, as possible based on federal regulations. There are certain elements that are common regardless of the program, such as household composition and income. However, each program area reviews cases using a different tool, looking at different elements, how to classify the items (case error, payment error, etc.), and reports out on those findings differently. This makes it hard for the counties and the state to take a more unified approach to solving accuracy challenges

The background is a solid blue color. It features several abstract geometric shapes, including squares and rounded rectangles, in various shades of blue and white. Some shapes are solid, while others are outlined. They are scattered across the page, with a higher concentration on the left side. The text 'Additional Opportunities' is centered in the lower half of the page.

# **Additional Opportunities**

## Additional Opportunities

The following are additional opportunities that were identified that would help Colorado in its administration of public and medical assistance programs. Through prioritization, they did not rise to the top as key recommendations or quick wins.

#	Opportunity
1	Update the current tracking and identification of expedited applications for SNAP.
2	Develop standardized performance expectations for worker productivity that take into consideration the differences of county size.
3	Establish a directory of eligibility workers who are fluent in languages other than English and route work to these staff as possible.
4	Assess how to broaden the existing outreach network to include additional programs and responsibilities so as to reduce work on the counties.
5	Develop an online statewide resource guide.
6	Explore methods to simplify the ways in which a client can provide their documents to the county more easily.
7	Utilize the upcoming CBMS re-procurement to identify and advocate for changes that will help improve overall functionality to the system.
8	Perform an assessment of the current interfaces into CBMS.
9	Create a statewide appointment scheduling system that all counties and clients can use to schedule and reschedule their appointments.
10	Develop a training for all eligibility worker supervisors that orients them to the role of a supervisor.
11	Create and administer an annual workforce and county operations survey.

The background is a solid blue color. It features several abstract geometric shapes: squares and rounded rectangles. Some are solid in a lighter shade of blue, while others are white outlines. These shapes are scattered across the page, with a higher concentration on the left side. The word 'Appendix' is written in a bold, yellow, sans-serif font in the lower-left quadrant.

# Appendix

## Recommendation 3: Sample Customized Positions

Sub-recommendation 2 suggests that the state create a series of job descriptions that improve career ladders and recognize unique skillsets. These sample customized positions, and their corresponding pay adjustments, could also be layered on top of one another. For example, a county could have a senior onsite eligibility worker with translation skills. This person would focus on complex cases for in person applicants who speak the worker's second language.

### Senior Eligibility Worker

- A promotional classification for an eligibility worker who has demonstrated strong performance and is able to successfully work the most complex programs and cases.
- This role also helps to mentor newer eligibility workers, similar to the “lead worker” role that exists in some, but not all, counties.

### Onsite Eligibility Worker

- This would be an employee whose primary work location would be in the local county office.
- These employees would conduct interviews with walk-in clients and assist clients with in-office application completion.
- This approach could increase employee satisfaction by having people self-select into an in-office role.

### Remote Eligibility Worker

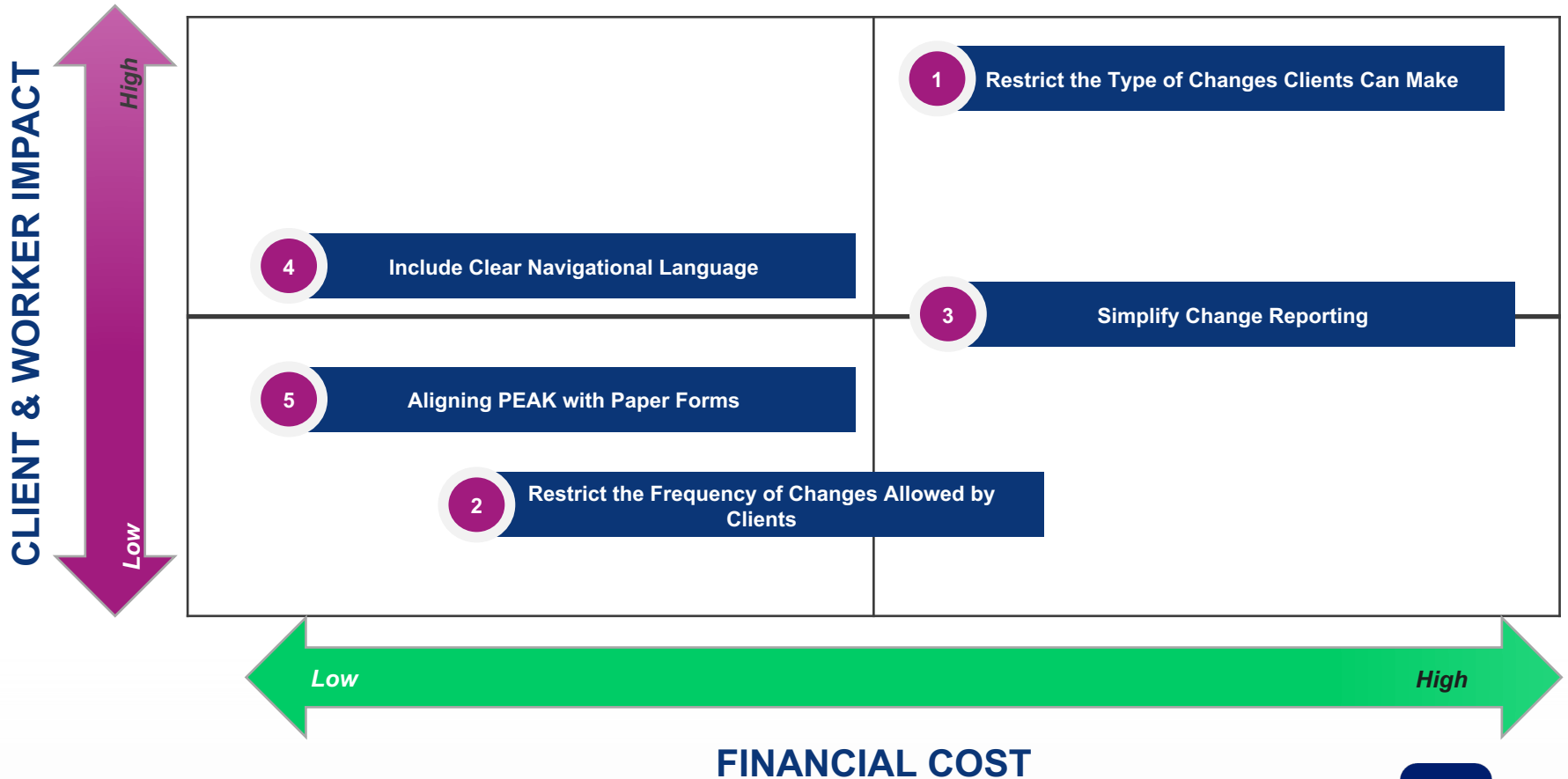
- This would be an employees whose primary work location is their home.
- They would work on applications virtually and would rarely be in the office. They may even live a considerable distance away.
- Creating distinct positions based on duty locations may help avoid conflicts with county-level telework policies.

### Eligibility Worker with Translation Skills

- This is an employee who is either a native or fully proficient speaker of a language other than English that is spoken in Colorado.
- These employees would first be assigned to cases with applicants who speak that language.
- Counties would have a directory of these employees for assisting applicants, significantly reducing the cost of an outside translation contract.

# Recommendation 4: Optimize PEAK Impact/Cost Matrix

Recommendations for PEAK may be prioritized several ways, including **weighing the intersection of cost and impact**. High impact features are ones which improve workflow efficiency and client experience. Low-cost features are ones which require fewer hours by web developers. Based on this analysis, low cost and high impact changes such as adding clear navigational language and aligning digital and paper forms are changes that should be prioritized.





**Solutions that Matter**