



Community Action Network Streamlining Common Eligibility Team 02/01/10 Meeting Minutes

Attendees: Kit Abney-Spells (Insure-a-Kid), Lisbon Berry (University of Texas), John-Michael Cortez (Capital Metro), Freddie Dixon (University of Texas), Ateja Dukes (City of Austin Neighborhood Housing and Community Development), Christie Garbe (Central Health), J.J. (Jawana) Gutierrez (Austin Energy), Mindy Kanewske (Family Connections), Rose Marie Linan (Catholic Charities), Claudia Lindenberg (Central Health), Jackie McLaughlin (HHSC), Miriam Nisenbaum (Easter Seals), Jo Kathryn Quinn (Caritas), Cathleen Rodriguez (City of Austin), Julie Weeks (Webb Family Resource Center), Greg Willis (Caritas)

CAN Staff: Chantel Bottoms, Mary Dodd, and Vanessa Sarria

Call to Order and Introductions: Attendees introduced themselves and explained their interest in this initiative.

Background on CAN Streamlining Common Eligibility Initiative: Vanessa Sarria, Executive Director of the Community Action Network (CAN), gave a basic overview of the organization. CAN's mission is to achieve sustainable social, health, educational, and economic outcomes through engaging the community in a planning and implementation process that coordinates and optimizes public, private, and individual actions and resources. Visit http://caction.org/about/CAN_Overview_2010.pdf to see the CAN Overview presentation. This particular initiative was launched in 2009 as an effort to maximize enrollment in public assistance programs. 2009 accomplishments included: 1) an inventory of agencies and resources that help with enrollment, 2) meetings with stakeholders to discuss what type of "community plan" was needed, 3) connections with other local and State efforts to improve the enrollment system and/or expand outreach and enrollment assistance, and 4) created a "straw-man" list of strategies for discussions with CAN councils. Through discussion, the goal of the initiative changed to optimizing all community resource. The messaging of the initiative changed to the "Stable Families, Healthy Community" five year plan. This three-pronged approach includes efforts related to advocacy and policy, a community resources 101 training series, and streamlined common eligibility. The tasks of the common eligibility team are to: 1) conduct an inventory of eligibility criteria and customer information used by organizations that determine eligibility with analysis of commonalities, and 2) propose a plan for developing virtual access to information used for eligibility determination across the range of services.

Proposed Concept for Streamlining Common Eligibility: The proposed "Virtual Warehouse of Common Eligibility Documents & Information" starts with customers giving service providers permission to input their data and documents into the virtual warehouse. Customers must give each service provider they see permission to access their documents from the virtual warehouse. Service providers determining customer eligibility input data into the virtual warehouse and get data from the virtual warehouse. See this diagram of the concept: <http://www.caction.org/initiatives/StableFamiliesCUEVirtualWarehouse.pdf>

Building on Current Efforts of Central Health and Healthcare Partners: Christie Garbe and Claudia Lindenberg of Central Health spoke. Their common eligibility initiative was initially called "Standardization of Sliding Fee Scale." Members of their project team include partners of the Integrated Care Collaboration. The goal was to develop a health care access policy for populations that self-fund their health care and have no current access to a full range of health care benefits. The initiative has a variety of goals including: 1) there will be a "no wrong door" approach to healthcare, 2) entities will be educated on the range of available healthcare services and eligibility requirements, 3) there will be the development of a regional approach, 4) customers will have a standard medical card, and 5) there will be consensus on definitions and eligibility documentation requirements. The initiative has been successful in creating shared standards for household sizes, a list of documents required to prove different types of income, and a list of documentation required to prove deductions. The next steps of the project are to discuss the logistics of a virtual warehouse. There must be a discussion of who can access the shared database and how they will be given permission to do so. Options being considered are: 1) an

authorization form is signed by clients that makes their data accessible to other providers, and 2) a “smart card” presented by customers gives authorization to view their records at the time of service.

Feedback:

- Challenges
 - What safeguards would prevent an agency from denying services to a client because they are receiving x other service from x other agency?
 - In order to meet data sharing standards such as HIPPA, certain encryptions of the data will need to be built into the system.
 - Hardware/software barriers?
 - How current would the information be in the system?
- Opportunities
 - “Smart Card” would prevent situations where clients give certain information to one resource provider does not provide access to the same data to other resource providers
 - Prevents inaccuracies in information that clients may provide to different service providers in their efforts to obtain services
 - Streamlining the process can keep clients from having to shop around for services
 - Could have some kind of system mechanism that alerts an agency of other services that the client may be eligible for
 - Could be an option that allows clients to determine their own eligibility for services
 - There are at least a couple of essential documents such as birth certificates that could be scanned in and would always be helpful to service providers.
- Quickest Wins
 - Clients will see this as customer-centered approach to services and will appreciate it
- Needed Resources
 - Data brokers (have information such as credit checks, vehicle registration, etc.) In their inventory process, University of Texas students could ask organizations: 1) do you use a data broker? and 2) how effective is it to use a data broker?
- Additional Stakeholders to Involve

Proposed Work Plan for Moving Forward: The Stable Families, Healthy Community five year plan includes work related to the Streamlining Common Eligibility Team. The first deliverable related to common eligibility is an inventory of eligibility criteria. The plan is to begin building off of the work that Central Health has done in its efforts to develop virtual access to information used for eligibility determination. University of Texas students will be trained by 2-1-1 to do this inventory. They will categorize the eligibility requirements and documents needed for clients to access services. The initial focus will be on Travis County. The goal is to know what “portfolio of documents” for each service category, and eventually for the whole spectrum of services. The state has a comprehensive list of eligibility documents that could be used as a template for the students to work off of (Kit Abney or Jackie McLaughlin could provide this). This comprehensive list will also have some common terminology to use to determine if the different agencies are using the same terminology as well as the same documents. The Streamlining Common Eligibility Team Deliverables include developing a plan for developing virtual access to information for eligibility determination. The plan would involve using information from the inventory to identify documents and eligibility criteria that could be scanned/placed on a secured on-line site. Data documents could then be used for eligibility determination for a range of services with the client’s permission. This plan would also involve auto-populating client applications for services.

Feedback on Proposed Work Plan & Next Steps: Attendees agreed to move forward with the plan. Any attendee not interested in participating should contact Vanessa Sarria. Team members who have suggestions for who else should be on the team should forward them to Vanessa Sarria. The Streamlining Common Eligibility Team will be meeting on the following dates: March 1st, May 3rd, June 7th, August 2nd, Nov. 1st, and Dec. 8th. The process will involve developing a plan, reviewing the common eligibility inventory, speaking with IT folks about capabilities for doing this kind of work, presenting progress to the CAN Board, and presenting a draft plan to the CAN Board in Dec.

Announcement: Attendees were provided with a handout on how to sign up for Neighborhood Housing and Community Development newsletter.

Adjourn: Meeting adjourned at 4:30 p.m.

Presentations and other information from Common Eligibility Team meetings are available online at: