Integration of Information and Referral Services: MassOptions Case Study

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Integration of Information and Referral Services
MassOptions Case Study

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Introduction & Background

• Launched in 2015 with Balancing Incentive Program (BIP) grant funding from CMS

• Collaboration among the Massachusetts Executive Office of Elder Affairs (EOEA), UMass Medical School, and UHealthSolutions

• **MassOptions is a free online and helpline service** to simplify access to LTSS for the elderly, individuals with disabilities, and their caregivers in Massachusetts
Goal: To create one centralized and innovative technological resource to connect individuals to multiple services and create a closed loop process

Features:
- Customer service contact center
- State-of-the-art website
- Self-service referral
- Online chat support
- Search functionality
- Ability to submit questions and feedback
- Fully-translated Spanish site
Multidisciplinary Team

<table>
<thead>
<tr>
<th>UMass Medical School</th>
<th>UHealthSolutions</th>
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<tbody>
<tr>
<td>• Content expertise</td>
<td>• Customer service contact center</td>
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<tr>
<td>• Project management and oversight</td>
<td>• Business process solutions support</td>
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<tr>
<td>• Reporting and analytics</td>
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<td>• Website design and accessibility compliance</td>
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<th>Executive Office of Elder Affairs</th>
<th>Community Partners</th>
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<tbody>
<tr>
<td>• Project sponsorship and oversight</td>
<td>• Stakeholder interaction</td>
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<td>• Subject matter expertise</td>
<td>• Training support</td>
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Technology Platform

**Multi-Channel Communications**
- Toll Free Phone
- LTSS Website
  - Email
  - Chat
  - Consumer Accounts
  - 24/7 Access

**Customer Service Center**
- Unified CRM
- Robust knowledge management system
- Integrated Provider Directory
- Call Recording

**Data Infrastructure Platform**
- Secure Data Center
- Mediware Integration
- Reporting Analytics
  - Powered by TrendFinder®
- ADRC & State Agency
  - Secure portal
Technology Platform

Website

Customer Service Center

CRM & KMS

Reporting & Analytics

Referral Exchange Portal

Closed Loop Process
Features & Benefits

- Centralized, non-disruptive intake services
- Focus on call resolution
- Reporting and analytics
- Interoperable design
- Consumer-driven, multi-channel communications
- Integrated CRM
Website

Features & Benefits

• Accessible and consumer-focused design
• Customer feedback used throughout development
• Multiple engagement options
• Google analytics routinely monitored (highly ranked)
• Fully-translated Spanish site

www.massoptions.org
Social Media Strategy

Campaign to push information out and drive traffic to website

- Scheduled posts
- Connections to social service agencies pages
- Consistent language and imagery
Customer Service Center

**Routes calls**

to designated staff based on skill set and priority level

**Allows for easy viewing of real-time information**

about each queue and specialist

**Captures and produces data**

regarding customer contacts across all channels

**Integrates with CRM**
CRM & KMS

CRM platform

- Customized for MassOptions
- Records and stores details on all contacts and supports robust reporting

Web-based KMS

Includes information on:
- Policies and procedures
- Call guides
- Training materials
- Key documentation
- Frequently requested phone numbers
Reporting & Analytics

• Portal provides **one-stop access to program metrics** for Customer Service Center, CRM, and website

• Displays metrics on phone calls, emails, chats, referrals, and website visitor traffic and behaviors

• Delivers **decision-support information**

• Accessible to users at EOEA and MassOptions
Referral Exchange Portal

- Referral is sent from CRM to Agency & Disability Resource Centers’ exchange portal
- Referral information is displayed in a secure website
- Agencies login to the portal to access referral information for their organization
- Intake staff take the appropriate actions after reviewing the referral
- Functionality has the ability to monitor that the agency and consumer have successfully connected
Closed-Loop Process

- Supports consumer-directed and provider-directed referrals
- Customer service center assists consumers through multiple channels
- Referrals, upon consumer consent, are shared with the referral agency via a secure portal
- An algorithm determines — based on age, demographics, and resource needs — the best referral source for a consumer
- Timely outbound follow-up call ensures consumer is connected to agency
Customer-Focused Approach

✅ **Multi-channel** portal designed for accessibility and responsiveness

✅ Resources designed to support **customer** needs and requests

✅ Focus on call resolution

✅ Customer surveys and feedback are utilized to make ongoing updates and add additional categories

✅ **High-touch approach = strong, positive outcomes**
Staffing & Training

• Staffing model included re-assigning existing staff and recruiting/training new employees
• Staff are routinely cross-trained to support multiple programs
• Staff members are trained in I&R
• Locally-based, multilingual team is representative of the culturally diverse populations served
• Telephonic interpreter service utilized for additional non-English language proficiencies
Results & Outcomes

• Collaboration with EOEA agency leads throughout the process ensured success

• Program was designed for ongoing scalability

• Effective I&R services are highly transferrable

• The program was leveraged for additional projects:
  – Inbound/outbound support for SCO & PACE
  – Outreach to consumers who use PCA services
  – Information and referral for 1-800-Age Info
• Most customers first heard about **MassOptions** online via search or **Mass.gov**

• Customers prefer to look for information on their own before contacting **MassOptions**

• **Key strengths:**
  – Ease of access
  – Centralized location for information
  – Attentive and knowledgeable staff
  – Multiple helpful resources
  – Connection to appropriate agencies
How People Find the Website

- Entered URL directly: 45%
- Linked from other site: 17%
- Other: 14%
- Social Media: 4%
- Paid Search: 7%
- Browser Search: 13%

- commed.umassmed.edu
Customer Survey Feedback on Website

“It’s a good website…It was easy to read, easy to understand.”

“There were a lot of links to take me directly to where I wanted to go. I had one specific question, but they answered a lot of questions that went along with them…”

“It has a lot of good information on it, like finding services and support…information about Medicare, MassHealth, other insurance, care management, caregiver support…”

“The homepage is attractive…tabs on the top (can) easily navigate, and the sidebar.”
Lessons Learned

☑ Marketing and social media strategy essential to launch and name recognition

☑ Important to have a multidisciplinary team of technical, operational, and programmatic experts

☑ Community and business partners essential to support multiple components

☑ Prioritizing durability and scalability allows for ease and efficiency of future expansion and configuration

☑ Measure demand and scale as needed