

TECHNOLOGY IN PRACTICE

MASSOPTIONS: A CENTRALIZED INFORMATION AND REFERRAL PLATFORM TO CONNECT CONSUMERS TO APPROPRIATE LTSS SERVICES

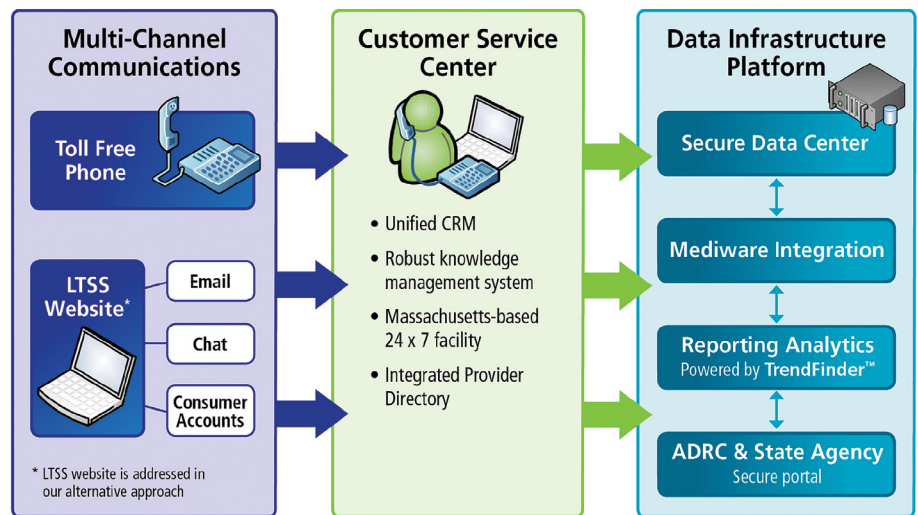
Background

In November 2015, the University of Massachusetts Medical School (UMass), its nonprofit business affiliate UHealthSolutions, and the Massachusetts Executive Office of Elder Affairs (EOEA) launched the MassOptions program, a free online and helpline service to simplify access to long-term services and supports (LTSS) for older adults, individuals with disabilities, and their caregivers throughout the Commonwealth of Massachusetts.

MassOptions is funded through a Balancing Incentive Program (BIP) grant from the Centers for Medicare & Medicaid Services (CMS). Part of the Affordable Care Act (ACA), the grant funding is designed to support increased access to non-institutional LTSS. Massachusetts committed 68 percent of spending to institutional LTSS and implemented important structural changes with the launch of MassOptions.

The goal of MassOptions is to create one centralized, innovative technological resource to connect

MassOptions Technology Platform



individuals to multiple services and create a closed loop process. In addition to operating a customer service contact center, MassOptions has a state-of-the-art website with links to information about the range of LTSS options available, the ability for consumers to complete a self-service referral, online chat support, robust search functions, the ability for consumers to submit questions and feedback, and a fully translated Spanish site.

Implementation

Overview and Strategy

A multi-disciplinary team, representing technical, operational, and programmatic expertise, established and successfully implemented a 24-week timeline for program launch. The project approach focused on providing a multi-channel communication platform, as well as a closed loop referral process that can support

MASSOPTIONS: A CENTRALIZED INFORMATION AND REFERRAL PLATFORM TO CONNECT CONSUMERS TO APPROPRIATE LTSS SERVICES

consumer-directed and provider-directed referrals. Self-service and ease of use were top of mind, combined with a high-touch, best-in-class customer service experience.

The technology platform utilizes service-oriented architecture, and while each component is integrated across the system to allow for a seamless customer experience, the functionality is modularized and additional functionality is easily added. The design specification is focused on durability and scalability, allowing for expansion of the platform as well as the ability to easily configure the technology to add more programs and services quickly and at minimal expense.

Department	Key Deliverable
UMass Information Services	<ul style="list-style-type: none"> ■ Website infrastructure ■ Telephony configuration ■ Customer relationship management (CRM) system ■ Knowledge management system ■ Email and chat functionality ■ Secure referral portal
New England INDEX, a UMass Shriver Center organization	<ul style="list-style-type: none"> ■ Website design ■ Accessibility compliance ■ Directory of resources ■ Online referral process ■ Learning management system
UMass Office of Survey Research	<ul style="list-style-type: none"> ■ Online survey tool ■ Customer satisfaction survey
Massachusetts Area Health Education Center (AHEC)	<ul style="list-style-type: none"> ■ Cultural sensitivity training
UHealthSolutions	<ul style="list-style-type: none"> ■ Contact center services
UMass Program Development and Project Management	<ul style="list-style-type: none"> ■ Program and content expertise ■ Project management
UMass Data Management Services	<ul style="list-style-type: none"> ■ Reporting and analytics

Referral Process

The information and referral process was addressed in implementation, both in the technology design and with contact center training. The contact center provides trained intake and referral staff to assist consumers seven days a week, via phone, email or chat, as well as a self-directed referral process on the website. The referral, with the consent of the consumer, is shared with the referral agency via a secure portal. The portal functionality has the ability to monitor that the agency and the consumer have successfully connected. For both the staff and the self-referral process, an algorithm is designed that determines, based on age, demographics, and primary resource needs, the best referral source for a consumer.

Website

Website development focused on ease of use, accessibility, and a responsive, consumer-focused design. Customer feedback was used throughout the process to obtain and integrate a consumer voice. A fully translated Spanish site is also available. The website is continuously updated with information and referral sources, and is checked for accuracy of information. The site incorporates Google search and analytics, which are monitored to assess traffic patterns and the effectiveness of information.

Staffing

UMass and UHealthSolutions have operated a customer service center since 2001. The MassOptions staffing model was developed by a combination of re-assigning some existing staff and recruiting and training new employees. By using this model, we were able to expedite the recruitment timeline and scale up more rapidly for the initial program launch. For the recruitment of new staff, we conducted job fairs and also partnered with local temporary staffing agencies in order to source a large number of candidates in a short period. As a matter of ongoing practice, contact center staff are routinely cross-trained to support multiple programs. This allows for greater flexibility in managing peaks and valleys in call volume as well as unplanned absences and attrition.

MASSOPTIONS: A CENTRALIZED INFORMATION AND REFERRAL PLATFORM TO CONNECT CONSUMERS TO APPROPRIATE LTSS SERVICES

Partnerships

Collaboration with partners was essential to facilitating training for both the contact center staff and the various community partners. UMass oversees the contract and project management functions of the MassOptions program. UHealthSolutions operates the contact center and helpline services. Program oversight is provided by the Massachusetts Executive Office of Health and Human Services and EOEA.

The website was built and is operated through a collaboration between New England INDEX, an organization that develops disability-friendly websites and operates out of the UMass Eunice Kennedy Shriver Center, and the UMass Information Services team. The Massachusetts Area Health Education Center provides training support and curriculum development in order to ensure that contact center staff are well-versed in responding to the needs of diverse populations. MassOptions also works with several regional partners, including the Aging and Disability Resource Consortia, the Aging Service Access Points, Area Agencies on Aging and Independent Living Centers, and state agency partners.

Results

The ability to effectively operate information and referral services is highly transferable, because there are countless opportunities to implement better ways to connect people with benefits and services they need and for which they are eligible.

In just the first year of operation, the proficiency demonstrated by the MassOptions program has been leveraged in the performance of two additional projects. The MassOptions team has conducted outreach to individuals who are potentially eligible for Program of All-inclusive Care for the Elderly (PACE) and Senior Care Options (SCO) programs and have made qualified referrals to PACE and SCO organizations. Additionally, the MassOptions team was engaged to outreach to consumers who utilize Personal Care Attendant (PCA) services. A recent regulatory change imposed tighter restrictions on overtime pay for PCAs. As a result, some consumers need multiple PCAs in order to fulfill the total hours of service needed. The outreach conducted by MassOptions was designed to educate consumers about how to find additional PCA resources who are able to support their specific needs.

Sustainability

The MassOptions program was launched as a component of the Balancing Incentive Program and Massachusetts' response to the "No Wrong Door" system approach. The CMS award funded MassOptions through June 30, 2017. In July of 2017, EOEA included ongoing operations of MassOptions in their fiscal operating budget, as the scope of MassOptions expanded to include information and referral services for other programs. This expansion created a one-stop resource for consumers, an alignment of resources into one consolidated center, and administrative efficiencies through the reduction of the total number of contact centers within the agency. To date, MassOptions has expanded to include customer service for the SCO program, and the age information line.

Visit MassOptions at <https://www.massoptions.org>

This project was supported in part by grant number 90IR0005-01-00 from the U.S. Administration for Community Living, Department of Health and Human Services, Washington, D.C. 20201. Grantees undertaking projects with government sponsorship are encouraged to express freely their findings and conclusions. Points of view or opinions do not, therefore, necessarily represent official ACL policy.