

Web-Based Common Intake, Eligibility and Referral



HAMMERMAN
& GAINER INC.

Streamlining Government Commission
Advisory Group on IT Integration
November 19, 2009

Company Background

- Celebrating 80 years of Continuous Service
- Largest Minority Owned Third Party Administrator (TPA) in the U.S.
- 295 full-time employees in twelve offices in Louisiana, Tennessee, Texas, California, Georgia, and Washington DC.
- Certified by the National Minority Supplier and in other certifying agencies Development Councils of Maryland, Louisiana and District of Columbia -DBE & HUB Zone.

Recent Experience

- H &G has a proven track record of providing solutions that streamline business processes through the use of technological solutions and business process outsourcing.
- Our professional and administrative services are delivered to government at the federal, state and local level as well as private businesses nationwide.
- Major service provider to the Louisiana Office of Community Development . Distributed \$8 billion for the Louisiana Road Home Program
- Launched the only real-time payment portal for claims in the Limited Benefit Market

Current Clients Include

- Pension Benefit Guaranty Corporation
- U. S. Department of Agriculture
- Louisiana Office of Community Development Road Home / Homeowners Assistance Program
- ICF International (Louisiana Road Home Program)
- Texas Property Casualty Insurance Guaranty Association
- Texas Wind Insurance Association
- City of Shreveport, Louisiana
- City of Alexandria, Louisiana
- New Orleans Regional Transit Authority
- New Orleans Redevelopment Authority
- Orleans Parish School Board
- Liberty Mutual Insurance Company
- Catholic Mutual Insurance Co.
- County of Lubbock, Texas
- Boise Cascade Corporation
- St. John Parish School Board, Louisiana

HelpEngen Platform

- ✓ Developer of intelligent health care & human service technologies
- ✓ Solutions focused on
 - Streamlining access management to health and human service programs
 - Government-sponsored health coverage [Medicaid, S/CHIP, etc.]
 - Income and work-support programs [SNAP, energy assistance]
 - Privately-sponsored local assistance, disaster relief programs [e.g., United Way, Red Cross]
- ✓ Deep understanding of
 - Health care and health insurance
 - Health and human services policy and regulation
 - Government agency operations

The HelpEngen Web Portal

- ✓ Software as a service
 - Minimal technology burden on users
 - Supports multiple operating models
 - Accessible from anywhere through secure login via the Internet
- ✓ Rules-based
 - Superior accuracy of analysis and results
 - Keeps the process impartial...and honest
- ✓ Whole household analysis
 - Potential resources for all members
- ✓ Benefit bundling
 - Focus on creating packages of benefits

Proven Performance

- ✓ Successfully deployed
 - 140,000 households helped [400,000 individuals]
 - \$400M in benefits delivered
- ✓ Thoroughly evaluated
 - Streamlines the process of applying for public benefits
 - Facilitates interaction between applicants and agencies
 - Helps connects with those who are “hardest to reach”
- ✓ Recognized for continuous and successful innovation
 - Recipient, MacArthur Foundation *Award for Creative and Effective Institutions*, 2006

HelpEngen Footprint

- ✓ In use since 2002 by > 150 organizations
 - Health care
 - Community-based organizations
 - Local Government
- ✓ Representative users include:

Health Care	NGO/Community Orgs.	Local Government
Resurrection Healthcare, Chicago IL Baystate Health, Springfield MA Dorchester House Multi-Service Center, Boston MA Network Health, Cambridge MA Oakwood Healthcare System, Dearborn MI St. Joseph Mercy Health System, Novi MI Shawnee Health Service, Carterville IL	Health Care for All, Boston MA Jewish Vocational Services, Boston MA Catholic Charities, Chicago IL Greater Chicago Food Depository, Chicago IL Legal Assistance Foundation, Chicago IL	Detroit Wayne Co. Health Authority City of Chicago Dept. of Human Services Chicago Public Schools County of Dukes County, MA

HelpEngen Key Features

- ✓ Eligibility assessment
 - Targeted screening
 - Multiple programs simultaneously
 - Real-time eligibility results
- ✓ Application preparation
 - Complete official forms ready for signature
 - Secure form storage for future use or audit
 - Supporting documentation capture
 - e-application where enabled by state agencies
- ✓ Management information
 - Real-time access to:
 - Cases
 - Application status & history
 - Staff productivity & workflow metrics

Targeted Screening

HelpENGEN™

Tracking Downloads Resources

Applicant -- Assistance Programs

Instructions

Select each program that the applicant would like to screen or apply for from the 'Assistance Program' list.

Please select the programs you would like to screen or apply for:

Health Programs

- All Kids/FamilyCare/Moms and Babies
- Request for Medical Benefits for Another Family Member(s) ?
- Medicaid Presumptive Eligibility
- Medical Assistance for Seniors (65 and older) and/or Disabled ?
- Medicare Cost Sharing Plans (Medicare recipients only) ?
- Help with Medicare Drug Plan Costs
- Circuit Breaker Grant/Illinois Cares Rx ?
- Breast and Cervical Cancer Program (screening only)
- Illinois Healthy Women ?
- Shawnee Financial Assistance Program

Nutrition Programs

- SNAP/Food Stamps - 2378B form
- WIC Screening Only

Other Programs

- Energy Assistance/LIHEAP Screening Only

0 Percent Complete

Continue Stop

Internet 100%

Screen and enroll eligible individuals in multiple health care and income support programs through a single interview

Detailed Household Information

The screenshot displays the 'HelpENGEN' web application interface. At the top, there is a navigation menu with buttons for Home, Cases, Last Case, Tracking, Last Query, Downloads, Resources, Worker, Office, and Logout. Below the navigation is a toolbar with various icons. The main content area is titled 'Household -- Household Members' and features a table of household members. To the left of the table are two panels: 'Questions' and 'Instructions'. The table lists three members: Mary D. Smith, Stephanie Smith, and George M. Smith. Below the table is a detailed form for a household member, with fields for First Name, MI, Last Name, Suffix, Gender, Date of Birth, Relationship to Applicant, and SSN. There are also checkboxes for 'Is this person a U.S. Citizen?' and 'Check all programs this person is applying for' (with 'MassHealth' checked). A 'Race' section includes checkboxes for Asian, Black/African American, Caucasian (White), Hispanic, Interracial, and Native Hawaiian or other Pacific Islander.

Name	SSN	Date of Birth	Status
Smith, Mary D	555-22-1111	10/06/1980	Current
Smith, Stephanie	222-33-1111	11/02/2006	Current
Smith, George M	999-88-7777	03/27/1997	Current

Questions
Who are the other members of the household?

Instructions
Enter each additional household member's name, date of birth, gender and SSN.
If applying for MassHealth, a social security number will be required for applicants, except

First Name: Stephanie MI: Last Name: Smith Suffix: Relationship to Applicant: Child
Gender: Female Date of Birth: 11 /2 /2006
Is this person a U.S. Citizen? Yes No
SSN: 222 -33 -1111
Check all programs this person is applying for: MassHealth
Race (check all that apply): Asian Black/African American Caucasian (White) Hispanic Interracial Native Hawaiian or other Pacific Islander

Collect household categorical and financial information

Extract data to produce standard and custom user-defined reporting

Eligibility Results

The screenshot displays the HelpENGEN web application interface for an eligibility assessment. At the top right is the HelpENGEN logo. Below it is a navigation menu with buttons for Home, Cases, Last Case, Tracking, Last Query, Downloads, Resources, Worker, Office, and Logout. The main content area is divided into several sections:

- Potential Eligibility:** A list of programs with checkmarks indicating eligibility: Medicaid for Parents and Caretakers, Medicaid and CHIP for Pregnant Women, Children's Medicaid and CHIP, Women's Health Program, and Hospital Financial Assistance.
- Eligibility Unlikely:** A list of programs with checkmarks indicating ineligibility: Medicaid for Seniors and People with Disabilities, Medicare Savings Programs, and Medicaid Buy in Program.
- Household Browser:** Lists 'Potentially Approved Members' (Smith, Stephanie and Smith, George M) and 'Potentially Denied Members' (Smith, Mary D). It also includes links for Income, Assets, and Deductions.
- Income Graph:** A bar chart showing income levels relative to FPL. The y-axis has markers for 0%, 160% FPL (\$2347), 222% FPL (\$3256), and 250% FPL (\$3667). A bar labeled 'Net' reaches the 160% FPL mark.
- Details:** Shows Family Size = 3, Gross Income = \$2,100.00, and Net Income = \$2,100.00.
- Member Details:** A prompt to 'Choose a member from the household browser for more details.'

At the bottom, a green progress bar indicates 'Percent Complete 97%'. To the right of the progress bar are buttons for Back, Save & Continue, and Stop. A yellow callout box on the right side of the screen contains the text 'Obtain detailed eligibility assessment'.

HelpEngen Key Features

- ✓ Eligibility assessment

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- Multiple programs simultaneously
- Real-time eligibility results

- ✓ Application preparation

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- Secure form storage for future use or audit
- Supporting documentation capture
- e-application where enabled by state agencies

- ✓ Management information exchange

- Real-time access to:
 - Cases
 - Application status & history
 - Staff productivity & workflow metrics

Document Imaging

- ✓ IMEngine image scanning and storage
 - Scanned documents are saved to secure HelpEngen servers
 - Prevents unsecured storage of personal data on desktops or local servers
 - Documents are packaged with case on Image tab

The screenshot displays a web application interface for a 'Case Browser'. The main case is identified as 'Case - Bellock, Mario'. On the left, there are links for 'Edit case information', 'Delete this case', 'New Case Note', and 'Print Case Notes'. The 'Household Members' section contains a table with the following data:

Name	Relationship	SSN	DOB	MRN
Bellock, Maria A	Daughter	333-33-3333	Dec 26, 1990	N/A
Bellock, Suzanne	Wife	222-22-2222	May 12, 1950	N/A

Below this is the 'Eligibility Screening' section, showing 'Public Benefit Program Screening (Open, View Results)'. At the bottom, there is a tabbed interface with 'Applications', 'Referrals', 'Case Notes', 'Case History', and 'Images'. The 'Images' tab is highlighted with a red circle. The 'Case History' table below it has the following data:

Worker / Organization	Date	Action	Status / Results
Sue Smith / Shawnee	Nov 22, 2007	Case Initiated	QuickScreen
Sue Smith / Shawnee	Nov 22, 2007	Screening Initiated	
Sue Smith / Shawnee	Nov 22, 2007	Application Forms Generated Shawnee Financial Assistance All Kids	
Sue Smith / Shawnee	Nov 22, 2007	Service note Gave QS printout. Told patient to go to DHS office to apply for food stamps.	
Sue Smith / Shawnee	Nov 22, 2007	Referred for Services Referred to: Man-Tra-Con Method: Phone Call	Accepted
Robert Jones / ManTraCon	Dec 15, 2007	Service note Did intake, assigned counselor	
Kim Sharp /SIRSS	Jun 12, 2008	Screening Modified	
		Application Forms Generated	

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Advanced Search

HelpENGEN™

Home Cases Last Case Tracking Last Query Downloads Resources Worker Logout

Case Search

Search Method	Search Options	Criteria
Last Name	<input checked="" type="radio"/> Begins With <input type="radio"/> Contains	smith
First Name	<input checked="" type="radio"/> Begins With <input type="radio"/> Contains	
SSN		- -
Date of Birth		/ /
Medical Record Number	<input checked="" type="radio"/> Begins With <input type="radio"/> Contains	

Limit search to My Cases
 Include household members in this search
 Include related offices in this search

[Find Case](#)

[Create a new case](#)

Search Results [2]

Name	DOB	SSN	MRN	Address
Smith, Mary	Aug 27, 1976	*** ** 9876	S-224596	3031 West Grand Avenue Detroit, MI 48202
Smith, Robert	May 11, 1958	*** ** 1290	S-227669	123 Delmar Street Detroit, MI 48211

Detailed Case Browsing

The screenshot displays the HelpENGEN web application interface. At the top right, the logo 'HelpENGEN' is visible. Below it is a navigation menu with buttons for 'Home', 'Cases', 'Last Case', 'Tracking', 'Last Query', 'Downloads', 'Resources', 'Worker', and 'Logout'. The main content area is titled 'Case - Smith, Mary' and is divided into several sections:

- Case Information:** Contains links for 'Edit Screening', 'View Eligibility Results', 'Modification History', and 'Delete this case'.
- Notes:** Contains links for 'New case note' and 'Print case notes'.
- Household Members:** A table listing family members with columns for Name, Relationship, SSN, DOB, and MRN.
- Applications:** A table listing various applications with columns for Application Name, Date, Status, and Links and Checklists.

Household Members Table:

Name	Relationship	SSN	DOB	MRN
Smith, Mary	Self	321-54-9876	Aug 27, 1976	S-224596
Smith, James	Spouse	789-56-1234	May 11, 1972	N/A
Smith, Elizabeth	Child	564-73-8291	Apr 30, 1998	N/A
Smith, Kelly	Child	987-65-4321	Aug 10, 2001	N/A

Applications Table:

Application Name	Date	Status	Links and Checklists
DHS Filing Form	Apr 10, 2009	Submitted	
Retroactive Medicaid	Apr 10, 2009	Submitted	
MI Child Worksheet	Apr 10, 2009	Created	MDCH Online Application
Michigan Assistance	Apr 10, 2009	Submitted	DHS-1171 Verifications List

Comprehensive Reporting

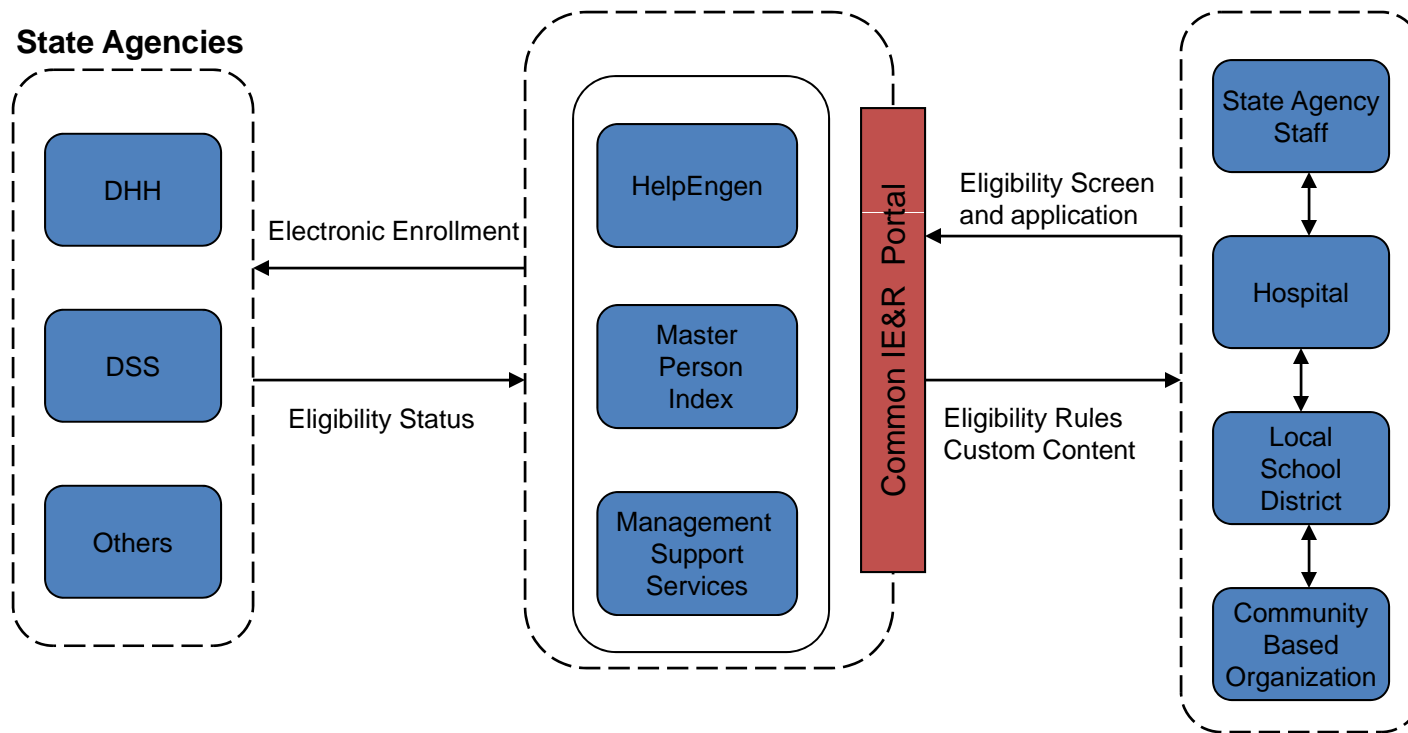
The screenshot displays the HelpENGEN web application interface. At the top right is the HelpENGEN logo. Below it is a navigation menu with buttons for Home, Cases, Last Case, Tracking, Last Query, Downloads, Resources, Worker, Office, and Logout. The main content area is titled 'Summary Results' and includes a 'Save' button and an 'Edit Query' link. A table shows the status distribution: Pending (11) and Submitted (11). Below this is a 'Details' section with a table of case data, including columns for Client Name, Soc. Sec. #, Form Name, Creation Date, Status, Status Date, and Awarded Date. The table lists 11 cases, all with a status of 'Pending'.

Client Name	Soc. Sec. #	Form Name	Creation Date	Status	Status Date	Awarded Date
Morris, Cathy	*** ** 7293	All Kids ACAA	Oct 15, 2007	Pending	Sep 2, 2008	N/A
Jacobs, Cathy D	*** ** 3987	All Kids ACAA	Oct 30, 2007	Pending	Sep 3, 2008	N/A
Leonard, Cathy K	*** ** 0688	All Kids ACAA	Oct 30, 2007	Pending	Sep 3, 2008	N/A
Camp, Cathy L	*** ** 1476	All Kids ACAA	Oct 31, 2007	Pending	Sep 3, 2008	N/A
Gomez, Maria	N/A	All Kids ACAA	Jan 16, 2008	Pending	Sep 2, 2008	N/A
Smith, Dominic	*** ** 9955	All Kids ACAA	Apr 29, 2008	Pending	Sep 2, 2008	N/A
Johnson, Mary E	*** ** 1515	All Kids ACAA	Jun 2, 2008	Pending	Sep 2, 2008	N/A
Bagwell, Cathy G	*** ** 3265	All Kids ACAA	Sep 2, 2008	Pending	Sep 2, 2008	N/A
Crocker, Janet	N/A	All Kids ACAA	Sep 2, 2008	Pending	Sep 2, 2008	N/A
Ellison, Debbie	*** ** 4589	All Kids ACAA	Sep 2, 2008	Pending	Sep 2, 2008	N/A
Cooper, Joan	*** ** 3987	All Kids ACAA	Jan 23, 2009	Pending	Jan 23, 2009	N/A

Case data accessible across sites/agencies

Extract data to produce standard and custom user-defined reporting

Basic Implementation View



Streamlining Impact

1 Enables delivery of highly tailored services at minimal cost and without disruption to state systems

- Intake Eligibility and Referral workflow can be tailored to end-user business and data management needs
- H&G responsible for delivery of content and functionality to the desktop
- Changes in business practice can be accomplished without modifying state systems

Streamlining Impact

2 Reduces customer service costs

- **H&G assumes responsibility for help desk and customer relations management functions**
- **State relates to one organization responsible for quality performance of multiple users rather than having to support those users individually**

Streamlining Impact

3 Enables information exchange and easy access to aggregate data

- **Policy and trend analysis**
- **Research**
- **Community needs assessment & tracking**
- **Federal - State mandated reporting**
- **Quality monitoring**

Streamlining Impact

4 Mobilizes private sector resources to support state initiatives without compromising state program integrity

- **Leverage the capabilities of local government and private voluntary organizations to assist in service delivery**
 - 211
 - Disaster relief organizations
 - Local school districts
 - Federally Qualified Health Centers
 - EITC campaigns

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HAMMERMAN
& GAINER INC.

Headquarters:

1980 West Main Street
Suite 200
Lutcher, Louisiana 70071

Washington DC office:

1325 G Street, NW
Suite 500
Washington, DC 20005

Other Nationwide Locations

Texas, Georgia, Tennessee,
California