

The Aging Services Network and the Use of Online Screening and Application Technology

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This report summarizes the main findings of an online survey of State Units on Aging (SUAs) and Area Agencies on Aging (AAAs) on the use of online screening and application tools to help seniors and younger adults with disabilities to enroll in public benefits. The survey was conducted by the National Center for Benefits Outreach and Enrollment (the Center) in partnership with the National Association of State Units on Aging (NASUA) and the National Association of Area Agencies on Aging (n4a).¹

Background

Along with the Administration on Aging (AoA), the 56 SUAs, 629 AAAs, 246 Title VI Native American aging programs, 20,000 service providers and a multitude of volunteers in communities throughout the nation, assist seniors across America to access information, determine their eligibility and enroll them in public benefits for which they are eligible.

A person-centered approach to benefits enrollment is increasingly important as these organizations continue to target hard-to-reach populations. This approach considers all clients' needs, informs them about eligibility for multiple benefit programs, and provides them with timely one-on-one assistance that is culturally appropriate.² One facet to further embrace and expand a person-centered approach to benefits enrollment is the use of web-based decision tools to screen and apply for public

benefits. Online screening and application tools have helped many organizations to streamline their enrollment processes by facilitating data-sharing across benefit programs and decreasing the amount of time that it takes to process an application. These tools have also resulted in a more efficient use of the organization's limited resources.³

Understanding the challenges and opportunities of using online technology to assist older Americans and young adults with disabilities to access public benefits is crucial for all the organizations that work to increase enrollment in key benefit programs. To that end, the Center, in partnership with n4a and NASUA, conducted online surveys of their member agencies on the use of online screening and application tools to enroll seniors and young adults with disabilities in public benefits.⁴ The survey specifically focused on the use of online tools to determine eligibility (screening tools) and to enroll (application tools) individuals in eight major federal and state programs: Medicaid, Medicare Savings Programs (MSP), Low Income Subsidy (LIS), Low Income Housing Energy Assistance Program (LIHEAP), State Pharmaceutical Assistance Programs (SPAPs), the Supplemental Nutrition Assistance Program (SNAP—formerly known as Food Stamps), Supplemental Security Income (SSI) and Property Tax Relief. The information collected in these surveys can be summarized in the following findings:

¹ Online screening tools are web-based decision tools that allow for assessing whether an individual is eligible for a specific benefit. Online application tools are web-based tools that allow for the electronic submission of an application for a given benefit.

² Summer, Laura (2009) "Increasing Participation in Benefit Programs for Low-Income Seniors" The Commonwealth Fund, page vii. Available online at: http://www.commonwealthfund.org/~media/Files/Publications/Fund%20Report/2009/May/1266_Summer_increasing_particip_benefit_progs_v3.pdf

³ Summer, Laura (2009) "Using Data-Driven Strategies to Enhance Benefits Outreach, Enrollment, and Retention Activities" National Center for Benefits Outreach and Enrollment. Available online at: http://www.centerforbenefits.org/Data-Driven_Strategies_Brief_FINAL.pdf

⁴ The results presented in this report are based on data collected through separate online surveys that was sent to the 56 State Units on Aging and the 629 Area Agencies on Aging. The responses for both surveys were collected between June 26 and August 4, 2009.

Finding 1: The majority of responding AAAs and state agencies use online screening tools or online application tools in their benefits counseling and enrollment activities.

The surveys show that three-fourths of the responding AAAs use either screening or application tools as part of their counseling and enrollment activities. Two-thirds of the responding SUAs indicate that their state uses either screening or application tools. The surveys also show that approximately one-third of these organizations use both tools. Based on the information provided by the responding SUAs and AAAs, the screening and application tools that are used in their organizations were developed by their own state or a partnership of organizations within the state. However, some state agencies and AAAs also use other tools such as the Social Security Administration’s Extra Help online application tool and NCOA’s BenefitsCheckUp.

Finding 2: SUAs and AAAs use their screening and application tools for a variety of benefits programs.

The surveys show that SUAs and AAAs currently use online screening and application tools for a variety of benefits programs. Among SUAs, online screening and application tools are most commonly used for Medicaid and SNAP, while among AAAs, these tools were most commonly used for the LIS and Medicaid. Both surveys show that the use of online screening and application technology is more extensive than the use of online application tools. For each benefit program, a higher percentage of AAAs and SUAs use an online screening tool than an application tool. This gap reflects important differences in the availability of online application tools compared to screening tools, but also, in some cases, the underutilization of integrated screening and application tools such as those available for LIS and SSI. Lastly, the survey shows that 1 in 10 AAAs and SUAs use screening and application tools for other benefits such as home delivered meals, home services and a variety of private benefits.

Finding 3: Reasons for not using online technology are varied; basic resource constraints remain important barriers for many SUAs and AAAs.

SUAs and AAAs listed several reasons for not using online screening and application technology. Among AAAs, the most common obstacle for the use of screening technology is the unavailability of tools for the specific programs for which they conduct counseling and enrollment. In addition, the surveys show that many AAAs are not using application tools because of the requirement to have a “wet” signature in the application and submit additional paperwork. Among SUAs, concerns about costs and privacy protection are among the top reasons for not using online screening and application technology. Lastly, the information provided by SUAs and AAAs indicates that resource constraints such as the lack of computer equipment, adequate training and offsite internet access remain barriers to the extended use of online screening and application technology.

Finding 4: The use of online application tools has benefited SUAs and AAAs in a variety of ways.

According to SUAs and AAAs, online application tools have helped their organizations to save time in their enrollment process. SUAs and AAAs also indicated that these tools have helped their case managers to conduct the proper follow-ups by allowing them to track the progress of a benefit application. More than one-fourth of the responding SUAs and AAAs indicated that online application tools have facilitated the exchange of data across agencies, therefore helping their clients enroll in other benefit programs. In addition to these benefits, a number of AAAs indicated these tools have helped them to ensure the accuracy and completeness of an application prior to its submission.

Finding 5: Many SUAs and AAAs are in the process of adopting online screening and application technology; key enhancements will make these tools more attractive to SUAs and AAAs.

Many responding SUAs and AAAs that are not using either an online screening or application tools will do so in the near future. These agencies reported that their states are in the process of developing these tools. The surveys also asked SUAs and AAAs to indicate what enhancements would make the adoption and use of online tools more likely. The responses provided by SUAs and AAAs were very similar. Both would be interested in a system that has low development and maintenance costs and that tracks the application process from beginning to end. Lastly, SUAs and AAAs would be attracted to a tool that allows caseworkers to verify the individual's enrollment status and that alerts the agency when their clients' renewal or re-determination period is approaching.

Conclusions

Every year SUAs and AAAs help hundreds of thousands of older Americans and younger adults with disabilities to enroll and obtain information about the federal and state benefits for which they are eligible. The results of the surveys show that the majority of SUAs and AAAs use online screening and application technology to support their counseling and enrollment activities, and that using these technologies have benefited their organization and their clients by helping speed the enrollment process and permitting the transmission of data to help individuals enroll in other programs. While the unavailability of online screening and application technology is the most important reason for not using online screening tools, many SUAs and AAAs do not use these tools due to resource constraints such as the lack of computer equipment, training and offsite internet access. These findings show that with proper support and resources, and the adoption of key enhancement to the existing tools, more SUAs and AAAs will increase the use of these tools and experience positive results similar to those reported by current users of online screening and application technology.

About this Report:

This report is a joint product of the National Center for Benefits Outreach and Enrollment, the National Association of Area Agencies on Aging (n4a) and the National Association of State Units on Aging (NASUA), supported by grant from the Administration on Aging, Department of Health and Human Services.

The **National Center for Benefits Outreach and Enrollment** is the resource center for organizations involved in the outreach and enrollment of seniors and younger adults with disabilities for public benefits. The Center is funded through a cooperative agreement with the U.S. Department of Health and Human Services' Administration on Aging. The Center is operated by the **National Council on Aging** a non-profit service and advocacy organization that works with thousands of organizations across the country to help seniors live independently, find jobs and benefits, improve their health, live independently and remain active in their communities.

The **National Association of State Units on Aging** (NASUA), founded in 1964, represents the nation's 56 officially designated state and territorial agencies on aging. The Association's principal mission is to support visionary state leadership, advance state systems innovation and articulate a national policy on elder rights and home and community based services for older adults and individuals with disabilities and their families.

The **National Association of Area Agencies on Aging** (n4a) is the leading voice on aging issues for Area Agencies on Aging and a champion for Title VI Native American aging programs. n4a's primary mission is to build the capacity of its members to help older persons and persons with disabilities live with dignity and choices in their homes and communities for as long as possible. Through advocacy, training and technical assistance, n4a supports the national network of 629 AAAs and 246 Title VI programs.

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