Decoding Common Challenges & Leveraging Low-tech Fixes for Better Customer Service





1 APPLICATION

CHALLENGES
Incomplete or incorrect
documentation of eligibility
submitted

CAUSES

- → Client don't know what documents are required
- → Cumbersome manual (mail or inperson) submission of documents

POTENTIAL SOLUTIONS

- ✓ Provide through multiple channels easy to understand checklist of which documents can be submitted as evidence for each eligibility requirement that documentation is required. Explain what to do if no documentation is available.
- ✓ Allow clients to take a picture of documents with their phone and upload it to their case file through an online portal or mobile app.
- ✓ Make process for uploading documents simple and easy to use.
- ✓ Utilize chat box or text message to allow someone to provide info w/o mailing or uploading

CHALLENGES
No response to interview requests or no shows to interview

CAUSES

- → Lack of timely notice
- → Transportation issues or hectic work/school schedules
- → No option to easily reschedule

POTENTIAL SOLUTIONS

- ✓ Send Text reminders before interview.
- ✓ Enable on-demand scheduling via web portal or mobile app.
- ✓ Email or text appointment details in advance, including checklist of documents needed and list of interview questions.
- ✓ Accept telephonic signatures for applications and renewals completed over the phone.
- ✓ Allow Live Chat feature for appointment rescheduling or cancellation.

2 INTERVIEW 3 ENROLLMENT

CHALLENGES
Individuals calling to find status of application, basic eligibility information, or where to submit information but facing long wait times and dropped calls.

3 USE/ADOPTION

CAUSES

- → Information on web portal or written materials not easy to understand or available (e.g., status of application).
- → Call centers or offices are only way to get info

POTENTIAL SOLUTIONS

- ✓ Use instant messaging (IM) tool for simple questions.
- ✓ Answer frequently asked questions via online chatbot
- ✓ Notify callers of expected wait times and offer a callback through the Interactive Voice Response (IVR) phone system
- ✓ Expand functionality of the online portal so clients can report changes and check benefit status themselves

CHALLENGES
Increase in churn; low
renewal / recertification rate

CAUSES

- → Clients are unaware renewal/ recertification form is due or don't receive it
- → Clients unclear what information is needed and send in an incomplete form.

POTENTIAL SOLUTIONS

- ✓ Text or Email clients simple reminders (at different times) that their renewal is due and provide links to the forms, online portal, or call centerwhere they can complete the renewal
- ✓ Send pre-populated form asking clients to only indicate where there are changes
- ✓ Allow clients to answer renewal questions on-line or via text
- ✓ Use a telephonic signature to accept renewals by phone

