

# Integration of Information and Referral Services

## MassOptions Case Study

Presented by:

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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

# Introduction & Background

**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

## UMass Medical School

- Content expertise
- Project management and oversight
- Reporting and analytics
- Website design and accessibility compliance

## UHealthSolutions

- Customer service contact center
- Business process solutions support

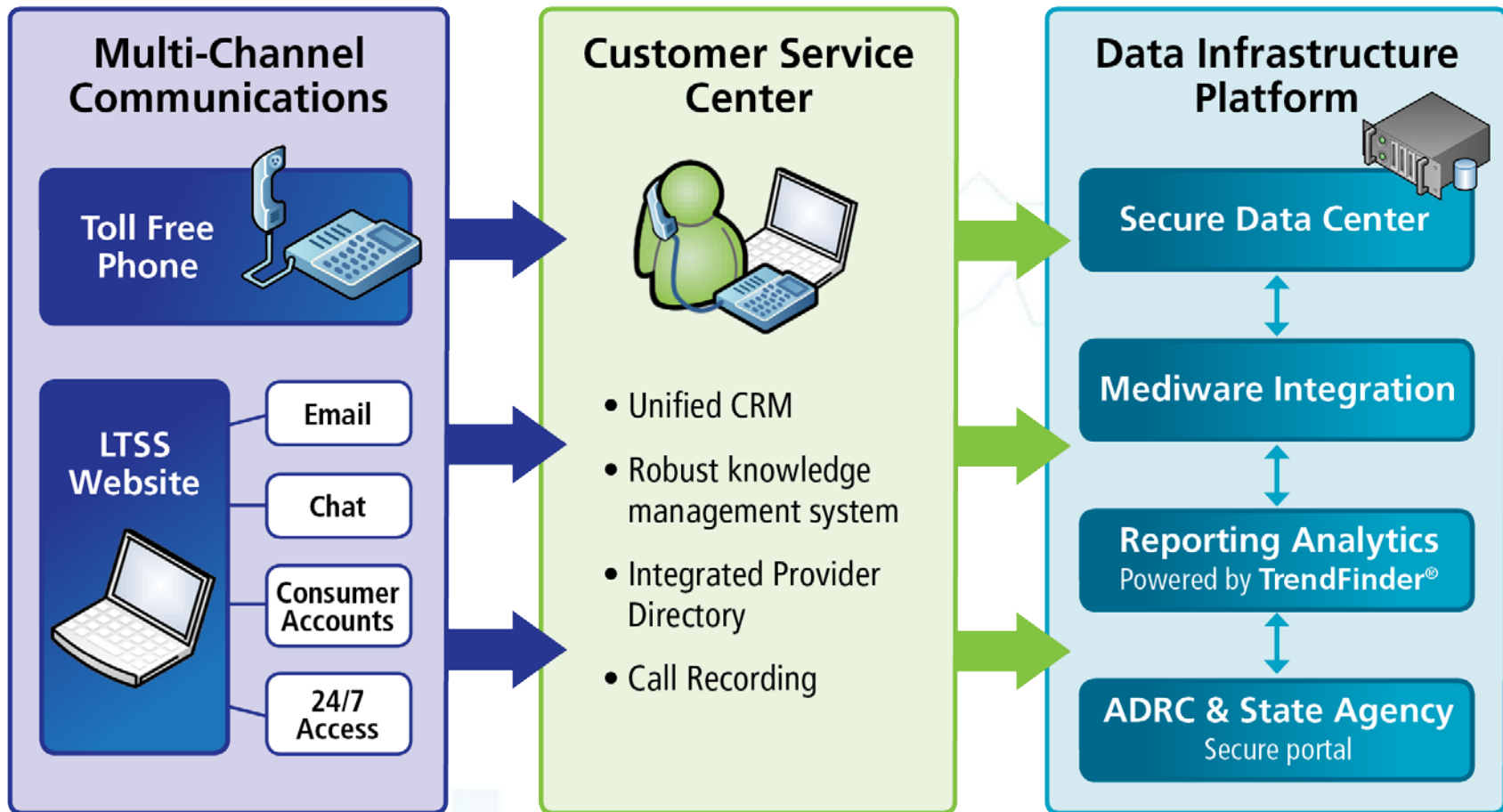
## Executive Office of Elder Affairs

- Project sponsorship and oversight
- Subject matter expertise

## Community Partners

- Stakeholder interaction
- Training support

# Technology Platform



# Technology Platform



**Website**



**Customer  
Service Center**



**CRM & KMS**



**Reporting &  
Analytics**



**Referral  
Exchange Portal**



**Closed Loop  
Process**

# Technology Platform

## Features & Benefits

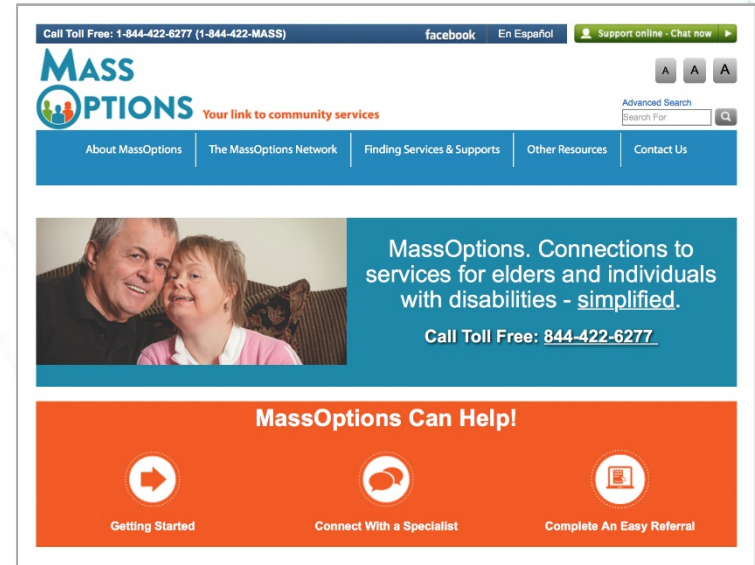
- Centralized, non-disruptive intake services
- Focus on call resolution
- Reporting and analytics
- Interoperable design
- Consumer-driven, multi-channel communications
- Integrated CRM



# 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



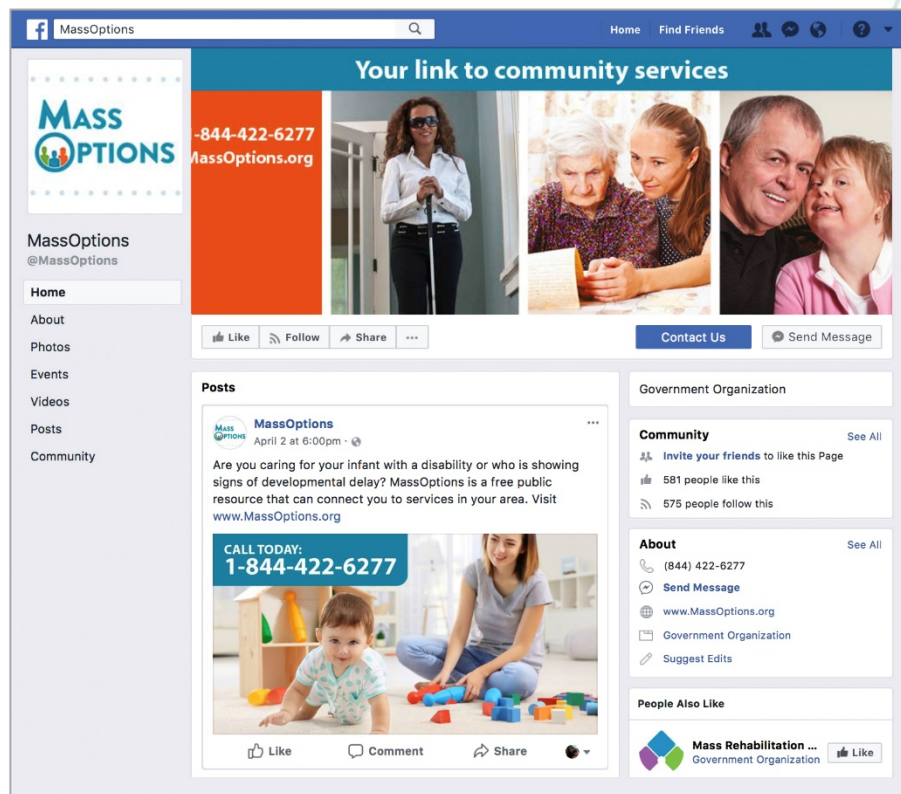
[www.massoptions.org](http://www.massoptions.org)



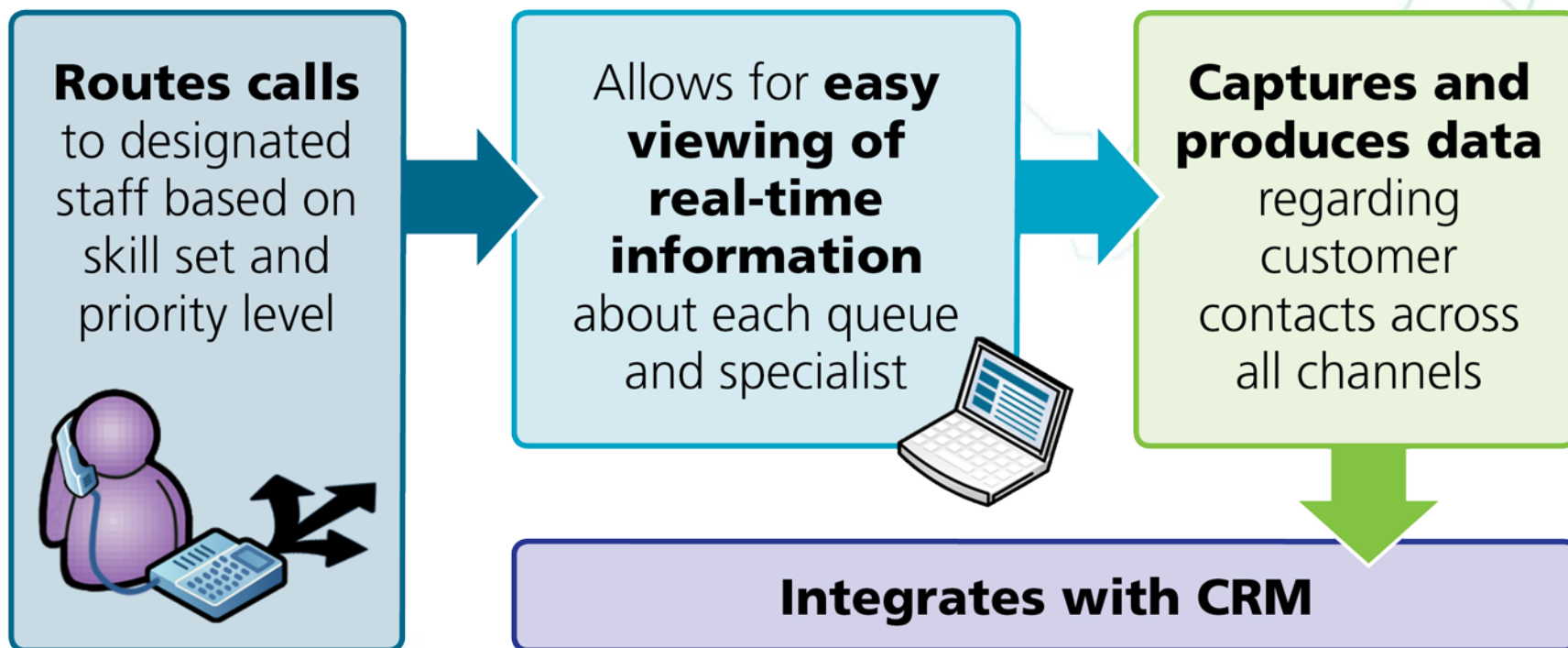
# Social Media Strategy

## 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



# CRM & KMS

## CRM platform

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

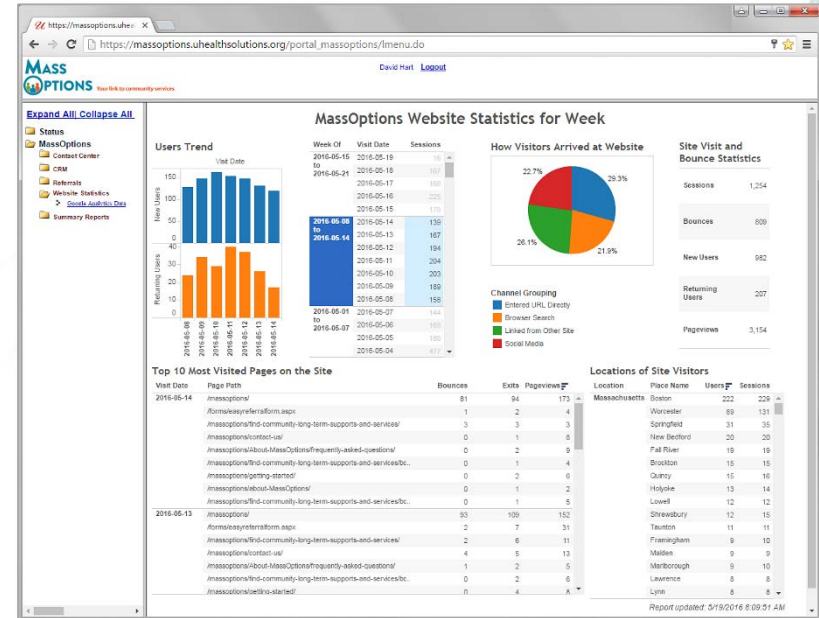
## Web-based KMS

### 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



**TrendFinder**  **LTSS**<sup>®</sup>  
Analytics for Health and Human Services

Powered by **UMass Medical School**

# 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**

MASS  
OPTIONS Your link to community services

UMASSMED/SingireP1

List of Referrals  
Click line item to see referral for your agency.

Show Referrals by status: Un-handled

Drag a column header and drop it here to group by that column

Id	Caller	Date of Referral	Status	Viewed By	Viewed Date	Commands
212539	1-Demo 1-Demo	05/05/2016 01:37 PM	New			View
212464	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View
212475	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View
212486	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View
212497	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View
212508	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View
212519	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View
212530	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View
212541	1-Demo 1-Demo	05/05/2016 01:38 PM	New			View

10 items per page 1 - 9 of 9 items

# 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



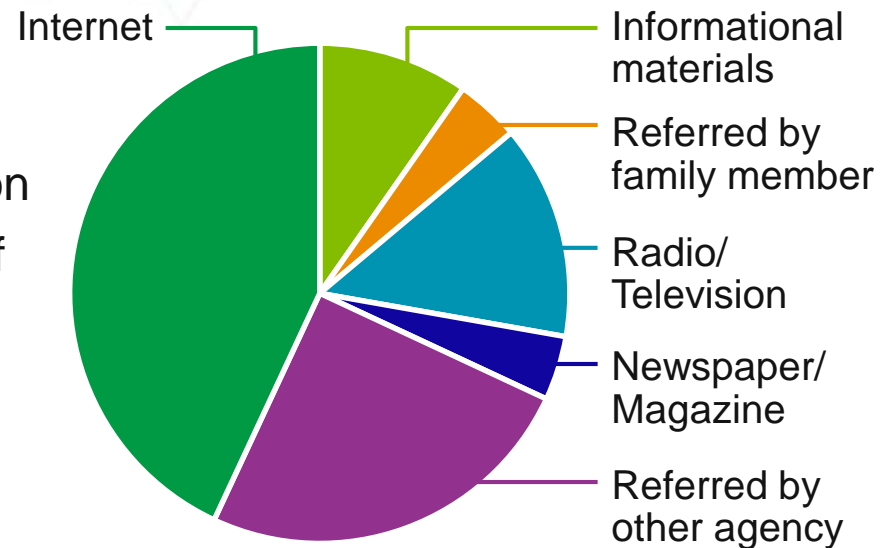
**Transferrable  
Services**

**Collaboration  
& Expansion**

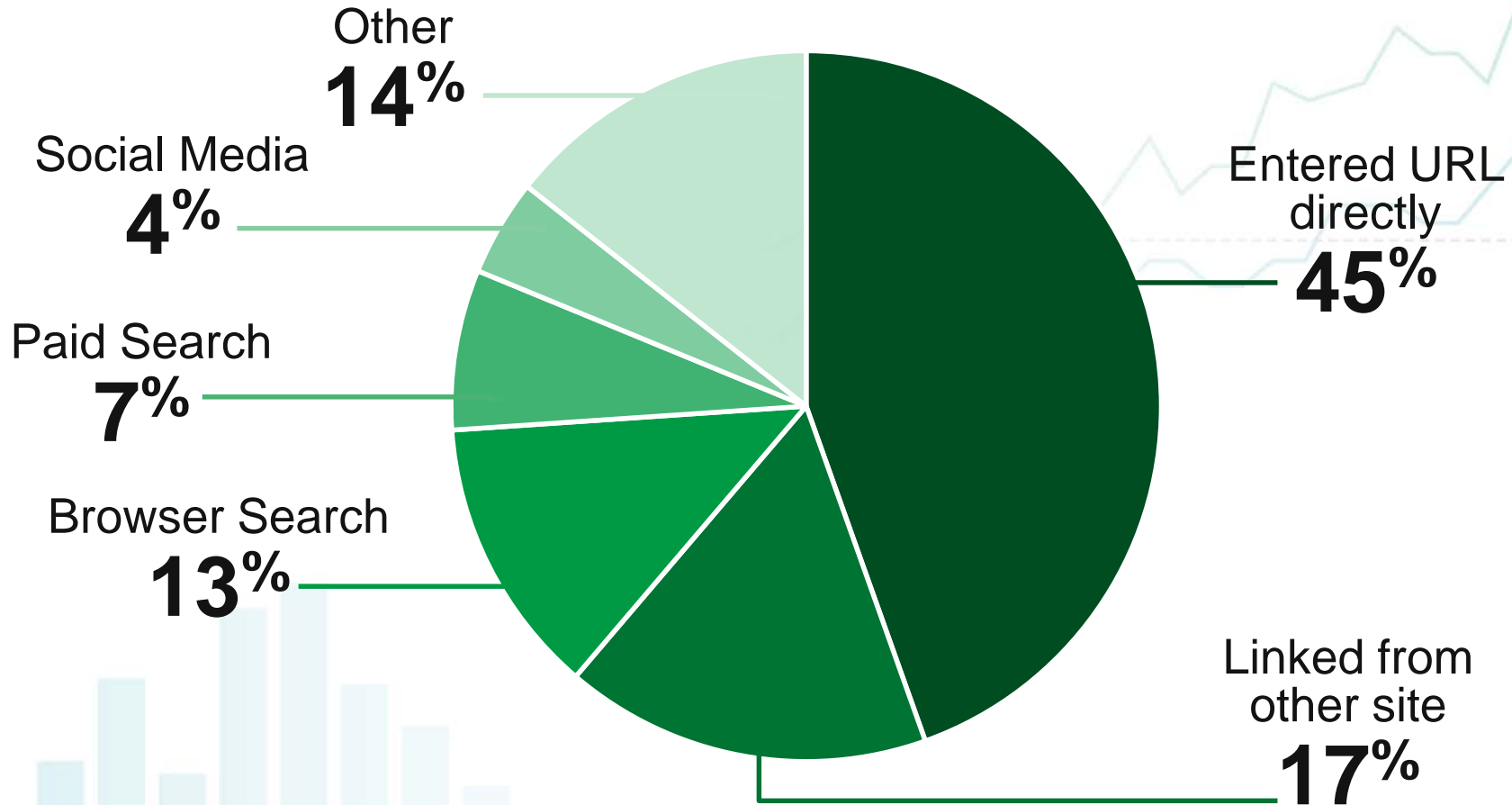
**Outreach &  
Referrals**

# Results: Customer Survey Feedback

- 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



# Customer Survey Feedback on Website

*"It's a good website...It was easy to read, easy to understand."*

accommodating  
pleasant respectful  
knowledgeable  
informative inexperienced polite upbeat  
clear genuine  
listened warm friendly  
uninformed reliable  
understanding professional patient nice  
courteous patient  
willing to help  
attentive

*"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

# Questions?

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UHealthSolutions, an affiliate of the University of Massachusetts Medical School