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Center for Public Sector AI

Category 1 Open Call Prompt Briefs: Enhancing Client Experience & Engagement

April 2024



CPSAI & the 2024 Open Call Process

CPSAI's 2024 open call strategy, developed with Health & Human Services (HHS) leaders nationwide, seeks to leverage emerging technologies to tackle key service delivery challenges within state HHS agencies. This strategy aims to accelerate learning and deployment by maximizing the number of thoughtful pilots and partnerships in state HHS agencies this year.

Since January 2024, CPSAI has collaborated with HHS agency leaders to identify and prioritize the most pressing issues their systems face. This effort has resulted in the creation of 'Prompts' - broad categories outlining areas where technological innovation can enhance HHS systems and the communities they serve:

Enhancing Client
Experience and
Engagement

Workforce
Support and
Effectiveness

Systemic
Efficiency and
Effectiveness

Reducing
Administrative
and Compliance
Burden

These prompts, developed through extensive stakeholder discussions, aim to spotlight nationwide HHS challenges deemed urgent and applicable to technology-based solutions. They are divided into two types:

Open Call Prompts: Priority issues selected through the consensus of HHS leaders. Only technologies addressing these prompts will be considered in CPSAI's 2024 Open Call.

General Prompts: Issues not prioritized for the 2024 Call but will be cataloged for future exploration by HHS agencies.

The prompts intentionally offer a broad overview rather than specific technological requests. This approach encourages innovative applications of technology to meet HHS challenges without prescribing detailed solutions. CPSAI's goal is to foster creativity and support a variety of technology solutions tailored to the diverse needs of state HHS agencies.

For more information on the Open Call Process, including updates and timelines, visit cpsai.org.



Category 1 | Enhancing Client Experience & Engagement

This category solicits emerging technologies focused on improving client experience and satisfaction across all program areas within health and human services systems. This category solicits tools that streamline client engagement with HHS services and empower clients to confidently navigate their way through government agencies and services.

Clients often engage with HHS systems through many channels, sometimes physically (within government offices) and other times engaging remotely (through online systems and software, contact centers, or other remote means). A typical case would see a client apply for benefits and/or seek resources online but later visit physical offices to meet with caseworkers, troubleshoot issues with their case, undergo eligibility interviews, or otherwise. From the client's point of view, this 'current model' for engagement with services can be clinical, bureaucratic, illogical, and intimidating. It's notable that for decades, clients' first typical contact with HHS systems has been with the security officers who screen them immediately upon entering office buildings. This often creates an initial feeling of fear, stigma, and hesitation that is carried through clients' engagements with complex and often overburdened HHS bureaucracies and digital systems.

Even when engaging with contact centers or online application systems, clients often face barriers that make them feel stigmatized and problematic

Applying for benefits over the phone often requires clients to wait for extended periods to speak with an HHS employee. Moreover, clients often have to call back multiple times to complete their case application or troubleshooting — with many intermediate calls leading to dead ends. Online applications face similar hurdles, as applying for benefits is complicated, and many clients incorrectly complete applications or submit the wrong personal information and forms, leading to a rejected application and further service delays due to a simple and avoidable clerical error.



In recent years, leaders across the nation have been working to transform the client experience into one that is hopeful, encouraging, and welcoming.

These leaders recognize that many firms in the private sector possess digital portals and customer support technology that provide a better experience to clients seeking services — whether in-person, over the phone, or online. This category seeks to overview how such leaders view opportunities for using emerging technologies to improve client experiences within HHS systems. These leaders hope that such technology can empower clients to quickly and accurately identify their needs and, in turn, how to best navigate the services and systems best equipped to address and support those needs. By focusing on clients' experiences within HHS systems and their customer support systems, this category focuses on a few key problem areas:

Improving HHS systems' customer support systems

Providing clients with diverse points of entry to HHS services

Removing language and education barriers to receiving services

Rendering HHS services accessible to those with disabilities

Providing clients control of their personal data

Each of these areas is a site of friction under the 'current model' of human service delivery. HHS systems across the nation regularly receive very low customer service satisfaction scores (if a given agency measures such data in the first place), and customers often express frustration over how difficult it is to identify the proper channels to address their needs or concerns. At the same time, many Americans eligible for HHS programs never realize they're eligible for HHS services, even when interacting with other government programs or HHS community partners, in turn leading to economically marginalized populations being chronically unsupported and underserved.



At the same time, the same marginalized groups are often overwhelmed by the requirements that must be met to receive HHS services — which include navigating complicated, often legalistic, confusing paperwork and communications that ask clients to repeatedly to provide the same personal data again and again. Likewise, many HHS offices struggle to accommodate non-English speakers or those with intellectual and physical disabilities. In summary, HHS clients often feel exhausted and overwhelmed, while HHS agencies feel ill-equipped to address clients' core challenges.

Issues such as these create chronic frictions that make receiving services tiresome, frustrating, and discouraging. Consequently, this category asks, 'How might emerging technology alleviate chronic frictions clients face when engaging with HHS systems and thus (A) improve client satisfaction and (B) restore client dignity?'

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Prompt 1.1 | Customer Support Experience

'Open Call Prompts' will be carried forward through the 'Open Call Process.'

Prompt Title:

Streamlining the client engagement experience to **improve customer service**, restoring human dignity, and building organizational trust between clients and the health and human services system.

Detail:

How can emerging technologies streamline and improve customer service and satisfaction in HHS systems?

Within HHS systems, clients are often asked to be emotionally vulnerable and proactive — to drive their own cases forward through difficulties and hurdles. This often leaves clients emotionally exhausted and overwhelmed as they navigate HHS systems, and this sentiment is reflected in the chronically low customer satisfaction scores HHS agencies across the nation frequently receive. In turn, this prompt asks how emerging technologies might build trust between clients and HHS systems, restoring clients' dignity by both empowering their ability to drive their own case and by empowering HHS agencies to better serve and respond to clients' needs.

Client dissatisfaction with HHS systems is especially pronounced across the nation regarding HHS customer service systems. These systems are regularly frustrating for clients, who are often left feeling disempowered, marginalized, and ignored as they seek help with their case. These systems are notorious for providing inconclusive, delayed support to clients, often requiring clients to contact agencies multiple times through different support channels to resolve their case concerns.



Prompt 1.1 | Customer Support Experience continued

'Open Call Prompts' will be carried forward through the 'Open Call Process.'

How might emerging technologies be brought to bear on HHS systems' customer service apparatus to improve client sentiment and satisfaction? It's important to HHS leaders across the country that their clients feel understood, valued, and responded to personally — that their needs are being heard, met, and answered in an effective and human-centered way. At the same time, there is an overwhelming sentiment among HHS leaders that many private sector companies possess customer service technology that allows customers to resolve their own difficulties and concerns in a straightforward, often seamless interaction (either online, over the phone, or in-person). How can emerging technologies similarly empower HHS systems so that clients are, in turn, able to take their needs into their own hands? How might emerging technologies enable HHS customer support systems to achieve parity with private sector customer support outcomes?

Another avenue for innovation is a corollary to this prompt: How might emerging technologies help HHS systems measure, survey, and track customer satisfaction more efficiently, regularly, and functionally?



Open Call Prompt 1.2 | Diverse Entry Points

'Open Call Prompts' will be carried forward through the 'Open Call Process.'

Prompt Title:

Providing a variety of **entry points** into the system and connecting clients to appropriate resources available through both government channels and community partners.

Detail:

How can emerging technologies connect HHS clients to a variety of entry points to services — referring them both to (A) points within HHS systems and (B) to resources available through other government channels and community partners according to whichever best addresses their specific needs?

This approach seeks to render HHS services more accessible by pointing customers toward various entry points to receiving services. On the one hand, this means expanding how clients engage with HHS systems. With the help of emerging technologies, might they open a case with HHS systems over the phone? Over text? Online? Might technology be able to recommend the best path to engage with HHS systems depending on a client's needs and situation?

On the other hand, emerging technologies might help other government agencies (besides HHS agencies) or vital community partner organizations identify when those they serve could be eligible for receiving HHS services, allowing non-HHS systems to refer clients to HHS programs.

Likewise, might emerging technologies help clients access their best path toward services — pointing them toward relevant nonprofit organizations when their needs and situation are incompatible with HHS service requirements?

This philosophy is colloquially called the 'no wrong front door' approach.



Open Call Prompt 1.2 | Diverse Entry Points continued

'Open Call Prompts' will be carried forward through the 'Open Call Process.'

In practice, this can look like someone first applying for HHS services after seeking help at a local YMCA, which, with the help of emerging technology, has identified their eligibility for SNAP benefits. Alternatively, someone who is applying for unemployment insurance could be identified by their state's employment security agency as eligible for WIC. The employment agency could automatically refer the client to their state's HHS agency, and the client might, in turn, use a similar technological assistant to guide them through the WIC application and process.

The 'no wrong front door' philosophy holds that HHS systems should serve clients no matter where they engage with government or government partners. This prompt asks how emerging technology might help make that philosophy a reality.

