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Appendix C.1. Kentucky Case Study Memorandum

Modernizing Channels of Communication With SNAP Participants

Kentucky Case Study Report

insight POLICY RESEARCH

Modernizing Channels of Communication With SNAP Participants Kentucky Case Study Report

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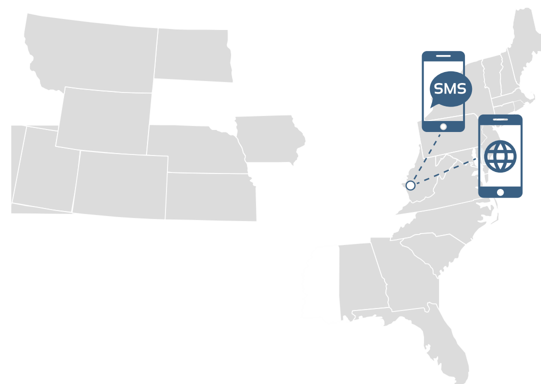


The primary purpose of the Modernizing Channels of Communication With SNAP Participants Study is to highlight best practices and lessons learned from various mobile communication strategies (MCS) implemented by Supplemental Nutrition Assistance Program (SNAP) State agencies. For the purposes of this study, MCS include mobile-optimized websites, mobile apps, and SMS/text messaging. Through five case studies, the study sought to examine the experiences of five States related to the development, implementation, and maintenance of MCS. The case studies complement other elements of the study aimed to provide an overview of MCS activities in all States, gather client perspectives on MCS, and synthesize best practices.

To understand best practices and lessons learned from each State's implementation of MCS, the study team interviewed 11 key stakeholders, including SNAP State agency staff, community partners, local caseworkers, and third-party vendors, about their roles in the implementation process between August and October 2021. The team also captured SNAP participants' perspectives through two virtual focus groups with SNAP participants in each of the five States.

This memorandum highlights findings from Kentucky's case study, including an overview of the State's MCS, goals and target audiences for the MCS, feedback from stakeholders, and a summary of perspectives from SNAP participants who use the MCS. The findings described below were compiled using detailed analyses of interview and focus group data.

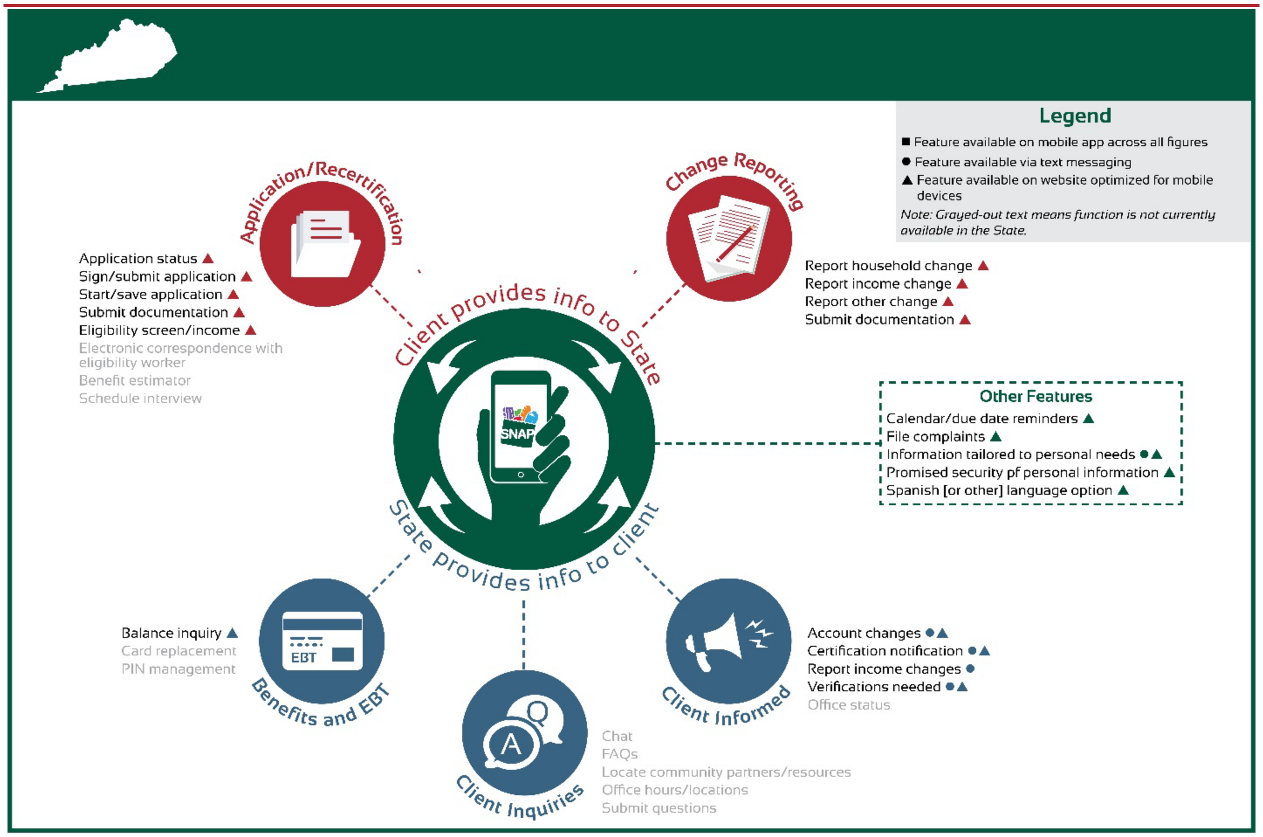
B. Overview of Kentucky's MCS

At the time this case study was conducted (summer and fall 2021), the State of Kentucky maintained a mobile-optimized website and used text messaging for SNAP communication and SNAP-related activities. Kentucky does not currently have a mobile app.

1. MCS Available in Kentucky

Several components of Kentucky's SNAP MCS operate in tandem with other social safety net programs, such as Special Supplemental Nutrition Program for Women, Infants, and Children (WIC); Temporary Assistance for Needy Families (TANF); and Medicaid. Although SNAP is operated independently from other social safety net programs, the goals, target audiences, and functional components of Kentucky's MCS for these programs often overlap. Figure 1 depicts MCS functionality.

Figure 1. Mobile Communication Tools and Features Available in Kentucky



Mobile- Optimized Website

The Kentucky Cabinet for Health and Family Services (i.e., the SNAP State agency) maintains a website portal called kynect benefits where beneficiaries can access multiple social safety net programs in addition to SNAP.

Functions and purpose. The mobile optimized website offers users options to start and save their application, check the status of their application, submit documentation, and determine if they qualify for SNAP benefits. They can access notices about their case and report changes to their case. Clients can check their electronic benefit transfer (EBT) card balance through the website but cannot replace their EBT card. The portal directs users to a number they can call with questions about their case or account. The most commonly used features on the website include uploading and submitting documents and reporting household changes.

Text/SMS Messaging

SNAP participants in Kentucky can opt in to receive one-way text messages about their SNAP case, including alerts about account changes and upcoming due dates.

Functions and purpose. Text messaging is primarily used to "nudge" clients for a variety of reasons, including account changes, certification notices, requests to report income changes or provide verification, and upcoming due dates. Usually, clients receive a link that directs them to their account on the kynect benefits website. Users can opt in to receive email notifications or text messaging about their account.

Mobile Apps

Kentucky does not currently have a State-maintained mobile app for SNAP services.

Use of third-party apps for SNAP. Clients can use other apps such as mRelief for screening and application assistance and Providers (previously called Fresh EBT) for instant updates to EBT balances across social safety net programs.

C. History and Implementation of Kentucky's MCS

To understand the history of MCS in Kentucky, the study team asked key stakeholders for their impressions of the implementation, continuous improvement, and utility of Kentucky's MCS. This section details stakeholder perspectives about the impetus for MCS development and improvement, specific SNAP audiences the State targets, marketing and outreach strategies, popularity and uptake of MCS, involvement of community partners, software infrastructure development, evaluation and monitoring of MCS for continuous improvement, and implementation challenges.

Prior to 2019, the State ran a website called Benefind, where beneficiaries could access State social safety net programs. According to stakeholders, this website was poorly maintained and had many technical issues; therefore, it was unpopular among beneficiaries. Beginning in 2019, the new State administration allocated resources for website improvement to streamline the processing and administration of benefits for the citizens of Kentucky. The resulting website is called kynect benefits. The State Secretary of the Kentucky Cabinet for Health and Family Services was credited with playing an important role in MCS development based on her previous experience with similar initiatives, familiarity with State programs, and relationship with community partners.

1. Goals for State MCS

The primary goals for developing and improving Kentucky's MCS included improving participation rates, building efficiencies around SNAP application and recertification processes, and creating a user-friendly experience for SNAP participants.

Improved participation rates. Individuals and families who qualify for SNAP may also qualify for other social safety net programs such as WIC, TANF, and Medicaid. The SNAP State agency and community partners prioritized the State's goal of increasing awareness of individual eligibility and thereby increasing participation in SNAP and other social safety net programs through the kynect benefits website. Some eligible individuals live far from county offices, restricting State staff's ability to identify potential beneficiaries and resulting in limited access to social services, specifically for rural individuals. MCS enable SNAP participants to obtain answers to SNAP questions remotely and submit supporting documentation for application and recertification without traveling to their local SNAP office.

Reduced churn. Another way to improve participation rates is to reduce churn. Churn occurs when a SNAP participant exits the program for a period of time and then has to reapply for benefits. Participants can lose or have a lapse in their benefits as a result of procedural issues or miscommunication. Churn is a significant concern among SNAP State agency staff. Processing documentation to solve this issue is administratively burdensome for participants and caseworkers. MCS were used to increase awareness of deadlines and missing documentation and thereby decrease churn.

> *My overall goal for this is to improve access—not just initial access but ongoing access so we don't lose people, cut down on the churn, and ensure eligible people continue to receive their benefits—and not lose them for some administrative reason.*
>
> —State SNAP Director

Efficiencies related to SNAP application and recertification processes. The SNAP State agency and community partners wanted to integrate MCS for SNAP with MCS for other social safety net programs (e.g., WIC, TANF, Medicaid) to consolidate participants' benefits into one platform and make users aware of other programs for which they may be eligible.

Improved SNAP beneficiary experience. To accomplish the goals described above, the SNAP State agency understood that MCS needed to be easy to use and access. The State considered convenience and ease of use to be important qualities when developing MCS to reach and retain clients.

2. Target Audiences

Although Kentucky's MCS for SNAP are intended for all SNAP and SNAP-eligible participants, certain subpopulations were deemed most likely to benefit.

Clients eligible for other benefits. Clients eligible for SNAP are often eligible for other services. The kynect benefits portal was designed to offer users multiple ways to connect with social support programs to improve awareness and uptake.

Clients who struggle with technology. Certain demographic groups are more comfortable using the kynect benefits website (and technology in general) than others. The website was designed specifically to accommodate clients who have challenges with technology.

Clients who need reminders. Some clients have difficulty tracking their case and knowing when they need to renew or provide additional information about their household, especially in response to temporary program rule changes. During the COVID-19 pandemic, FNS implemented waivers that changed benefit amounts and recertification deadlines. These changes created an additional challenge for participants because the program operated differently than what they were accustomed to. For example, pandemic-related changes in the timeline to review benefits caused some clients to miss their deadlines and temporarily lose their benefits. This churn affected uptake and caseworker workload. State staff use MCS such as text messaging and the website to remind clients about their applications and walk them through the process.

Clients who live far from SNAP offices. Some clients live far from brick-and-mortar offices, and others have limited broadband internet access at home. MCS make it easier for clients to apply for benefits because they can complete the process remotely and use cellular data service instead of broadband.

> *There are many regions in Kentucky where [satellite dish is] all they have—if they even have that. And then you have to look at our demographics as far as poverty. In the eastern part of this State, most people cannot afford any type of internet at all. So that's something you have to consider.*
>
> —Caseworker

Clients affected by COVID-19. The economic impact of the COVID-19 pandemic were far reaching. Because of this, the number of SNAP applicants increased substantially during the early days of the COVID-19 pandemic. Many parts of the SNAP application process were adjusted to streamline program administration and accommodate operational changes to protect worker and client safety. However, office closures in response to COVID-19 made it difficult for newly eligible clients to apply for benefits. The website helped facilitate uptake because applicants could apply and upload documents virtually. Stakeholders noted the website helped keep SNAP users on track by providing necessary reminders, despite uncertainty surrounding temporary eligibility requirements and waivers.

3. Marketing and Outreach Strategies

The SNAP State agency deployed various strategies to inform and encourage SNAP participants to seek out MCS available to them.

Social media. Social media has been the most prominent method of marketing and outreach to inform current and potential SNAP clients about kynect benefits. Posting important announcements through the SNAP State agency's social media accounts and those of community partners has facilitated wider outreach to SNAP recipients. One community partner highlighted how digital communications led to less participant stress than receiving formal letters in the mail from the SNAP office.

Paper mail. Each mailed correspondence SNAP participants receive about their case includes reference to the kynect benefits website encouraging them to visit the site to manage their applications and benefits. State staff perceived this low-tech method of outreach and communication to aid in uptake and decrease churn.

Word of mouth. SNAP participants are informed about the kynect benefits website and text messaging option by SNAP caseworkers, other SNAP participants, and community-based organizations (CBOs) that help them with their cases. SNAP State agency leadership encourages caseworkers to inform SNAP participants about the kynect benefits website and text messaging as part of their interactions in local offices and during customer service telephone calls.

4. Popularity and Uptake of MCS

Although the kynect benefits website was operating before the COVID-19 outbreak in January 2020, uptake increased substantially during the pandemic. According to stakeholders, the use of the website increased among individuals looking for SNAP and non-SNAP benefits, those who learned about the website through word of mouth, those financially affected by the COVID-19 pandemic, and those aided by community partners.

Users discovering the kynect benefits website. Some clients first learned about their eligibility for SNAP through the kynect benefits website, where users can browse other social safety net programs, helping to increase uptake.

> *Usually we don't have sudden uptick of users, but ... there were definitely more users who enrolled in SNAP during the initial days of COVID, and I think it's still in the same phase.*
>
> —SNAP State agency staff

Impact of the COVID-19 pandemic on uptake. In response to the economic effects of the COVID-19 pandemic, SNAP applications increased substantially and remain high.

Improvements to website design. Stakeholders explained that improved usability of the website was one of the primary reasons for increased user uptake. They felt previous versions of the website were text heavy and unclear. Improvements ensured the text was concise and the interface was easier to navigate. However, some worried uptake was not as high as it could be because of SNAP clients' poor experiences with the former website.

Optimization of the website for use with mobile devices. Many Kentucky residents do not have access to broadband internet, so a mobile-optimized website enables users to access the full functionality of the website using cellular data from their mobile devices. State staff added that younger users like to use MCS and are more comfortable with the technology because they use their mobile devices for myriad other purposes.

5. Involvement of Community Partners and Other Stakeholders

When the State sought to improve the kynect benefits website, it engaged several community partners to provide feedback based on their understanding of the SNAP beneficiary population. Since the implementation of Kentucky's MCS, the State has continued to engage CBOs to improve MCS functionality and outreach.

Monthly meetings with CBOs. The State Secretary's office hosts monthly meetings with CBOs and the SNAP State agency to discuss dissemination strategies and improvements to the kynect benefits website and other SNAP communications. These meetings help the SNAP State agency keep an ongoing dialogue with CBOs that consistently interact with the target audience.

Tracking MCS technical issues. One CBO tracks technical problems SNAP participants experience with the kynect benefits website and shares them with the SNAP State agency to address persisting issues. Ongoing dialogue between CBOs and the SNAP State agency facilitates rapid improvements to minimize the number of clients experiencing difficulty.

Overall, community partners felt the SNAP State agency was committed to making assistance programs easier to use and improving access to these programs through outreach. They noted a drastic improvement in community engagement with the Beshear Administration.

6. Software and Data Infrastructure

The planning and development process for the mobile-optimized website and text message functionality took approximately 2 years to launch. State staff, State leadership, a third-party software developer, and community partners met several times to discuss design elements. These discussions led to data migration from .NET[1] to Salesforce,[2] which made the platform more efficient and flexible to update. Involving the appropriate partners promoted confidence in the quality, efficiency, and security of the data being managed within these systems.

Website updates and optimization for mobile devices. The SNAP State agency contracted with a third-party vendor to make substantial improvements to the kynect benefits website and optimize it for use with mobile devices. The vendor designed, developed, and implemented the mobile-optimized website in collaboration with State staff.

Infrastructure migration from .NET to Salesforce. The kynect benefits website includes a client-facing self-service portal and a caseworker portal accessible from the same user interface. Although SNAP clients and caseworkers engage with the same website (i.e., front end), the technology infrastructure (i.e., back end) is managed separately—one system for the client side and another for caseworkers. The third-party vendor conducted a study for the State that resulted in migrating the client self-service portal from Microsoft's .NET framework to a Salesforce-based ecosystem. The Salesforce technology does not require a business analyst to make updates and changes, as .NET did. State staff also indicated it was easier to identify technical issues with Salesforce. State staff viewed the migration as an upgrade to the previous infrastructure.

Data and security. Stakeholders reported data security issues were not a challenge in the implementation and maintenance of the State's MCS. They attributed the successful application of data security to Medicaid, TANF, and SNAP systems being internally integrated and having a strong team of highly qualified staff whose primary role was to manage data privacy and security requirements. Substantial testing during the MCS development process ensured all data were safeguarded appropriately.

Ongoing maintenance and improvements. Since the implementation, the third-party vendor continues to maintain the State's eligibility system shared by SNAP, TANF, Medicaid, and Childcare Assistance. This work includes providing analytical reports for tracking churn and website use.

7. Evaluation and Monitoring of MCS

As discussed in section 5, the SNAP State agency regularly engages with community partners to gauge the successes and limitations of Kentucky's MCS; the agency also reviews website analytics to understand how MCS are beneficial and whether the State needs to address administrative issues such as churn, communication usefulness, and technical issue tracking.

Use of MCS analytics to decrease churn. The continuous monitoring of and improvements to MCS tools create more opportunities for SNAP clients to receive notifications needed to maintain their benefits. The use of email, paper mail, text messages, and portal notifications is motivated by the goal of preventing churn. The SNAP State agency can determine if electronic notices posted in user accounts on the kynect benefits website were opened. Recent statistics show the read rate on electronic notices is high, reassuring the State that participants are receiving necessary notices. Communicating through paper mail alone inhibits the agency's ability to know whether participants received or read the notices.

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[1] Microsoft .NET Framework is a software framework that enables multiple programming languages to work together. It requires the user to have computer coding skills.

[2] Salesforce is a service that facilitates interoperability between programming languages, but its user interface does not require the user to have coding skills (i.e., it employs a point-and-click interface).

Notice Improvement Project. The State confers with partner CBOs on their Notice Improvement Project, with the CBOs providing feedback on the readability and usefulness of the notices SNAP clients receive not only through paper mail, but also through the kynect benefits website. SNAP State agency staff and CBOs develop creative solutions to ensure notices are not confusing and do not interfere with other agency efforts.

Technical issue tracking. The SNAP State agency identifies technical issues with the kynect benefits website through reporting from community partners and Google Analytics tracking.

8. Implementation Challenges

As expected with most new initiatives, there were implementation challenges associated with the transition and upgrade of the kynect benefits website.

Institutional and bureaucratic barriers. Stakeholders noted the inherently bureaucratic structure of State government created a barrier to the efficiency of the MCS implementation process. They felt the bureaucratic structure led to miscommunication and slower implementation, impeding changes to any element of the process, such as language used for client-facing information or back-end systems used by caseworkers and State staff.

> *What's maybe a little bit frustrating is just bureaucracy and how slow and tedious things can be. Changes take a lot of time, and they have to go through a lot of processes, so changes don't always come as quickly as you'd like.*
>
> —Community partner

Integration of multiple technology systems. The kynect benefits website intercepts a substantial volume of data collected across multiple social safety net programs; this volume increased as a result of the COVID-19 pandemic. The pandemic's effects on employment and social distancing requirements led to a large influx of business conducted through the kynect benefits website. The sudden increase in online interactions resulted in issues with data matching, especially when clients uploaded documentation to support their case. Some caseworkers indicated data matching issues resulted in spending more time on cases to re-index uploaded documentation, whereas documentation received via paper applications would have been initially indexed correctly by the caseworker.

Confusion about document submission sometimes resulted in churn when clients were unaware that some of their documentation had not uploaded properly. Caseworkers and State staff indicated these issues had been resolved but were a challenge during implementation.

Beneficiary assistance and user permissions. Individuals authorized by Kentucky to help beneficiaries with their cases are called "kynectors." Kynectors include State and CBO staff who reach out to beneficiaries through monthly events in high-traffic areas such as community centers and health clinics and make home visits to clients who are homebound or do not have reliable transportation. Kynectors are equipped with laptops, printers, cell phones, and internet access to help clients apply for benefits (including assistance programs other than SNAP). The presence of kynectors is supported by peer-reviewed literature that found consumers who received in-person assistance were more than twice as likely to successfully enroll in social safety net programs than those who tried to enroll online without any assistance, and those who received local assistance were the most successful.[3]

Although the presence of kynectors is important to the success of the implementation of Kentucky's MCS, implementing the process across social safety net programs was challenging. For example, a kynector who was an expert in SNAP but not Medicaid needed assistance from another kynector with experience in Medicaid, even though, from the client's perspective, the activities were all conducted through the same website.

State staff explained that identifying user permissions for kynectors while ensuring security and privacy was another challenge. The most effective way for kynectors to help beneficiaries is to have direct access to their cases, with proper safeguards in place so that kynectors can see only the case they are assigned.

D. Perceived Benefits and Limitations of MCS Features

Stakeholders shared their perspectives on Kentucky's MCS and described how MCS implementation affected State and local operations. Stakeholders also shared what resources they believed would help streamline SNAP business via MCS tools.

1. Perceived Benefits

Overall, stakeholders agreed optimization of the kynect benefits website for mobile devices was an essential component of its success in meeting the goals of Kentucky's MCS.

Fewer barriers to internet access. Large regions of Kentucky are rural, and some do not have access to broadband internet. However, many of these areas have access to cellular data. A mobile-optimized website enables users who live in these areas to benefit from the conveniences of the kynect benefits website.

Access for a population with limited access to computers. It is more common for the SNAP-eligible population to have access to mobile devices with internet capabilities than to computers.[4] A mobile-optimized website helps SNAP clients submit their applications, recertifications, and verifications easily via their mobile devices. No printers or scanners are necessary because users can upload documents to the website directly from their mobile devices.

Access for beneficiaries who may be eligible for additional social safety net programs. Many individuals learn they are eligible for SNAP while visiting the kynect benefits website to enroll in health insurance. One community partner explained that website visitors have to identify which program they are interested in applying for. This community partner recommended reconfiguring the flow of the website to inform individuals which programs they qualify for by asking a series of questions upfront, helping prevent clients from "falling through the cracks."

[3] Grob, R., & Schlesinger, M. (2015). Educating, enrolling, and engaging: The state of marketplace consumer assistance under the Affordable Care Act. *Health Affairs, 34*(12).
[4] McCloskey, M. L., Thompson, D. A., Chamberlin, B., Clark, L., Johnson, S. L., & Bellows, L. (2018). Mobile device use among rural, low-income families and the feasibility of an app to encourage preschoolers' physical activity: Qualitative study. *JMIR Pediatrics and Parenting, 1*(1).

Improved application processing time. According to State staff, the website made enrolling easier and enabled participants to receive their benefits more quickly because electronic submission facilitates a decrease in application processing time.

2. Perceived Limitations

Although stakeholders overall approved of the usefulness of Kentucky's MCS, some limitations persist.

Lack of functionality. At the time of this study, Kentucky's SNAP beneficiaries were unable to receive online application assistance (e.g., live chat), view communications in languages other than English, or conduct their interviews online. Some forms could not be signed electronically—a barrier for many SNAP clients without access to a printer.

Areas of Kentucky without cellular service or broadband internet. Although the mobile-optimized website mitigated broadband issues for regions with access to cellular data service, some regions of Kentucky have neither broadband nor cellular service. SNAP clients in these regions must conduct their business through low-tech channels such as paper mail or in-person office visits.

Security and data privacy concerns. Some clients are hesitant to conduct SNAP-related business via the internet because of security and data privacy concerns. These clients feel more comfortable using low-tech channels.

3. Effects of MCS on State and Local Operations

From continuously identifying areas for improvement to restructuring the processing of applications and recertifications, the implementation of Kentucky's MCS affected the way State staff and local caseworkers conducted SNAP-related business.

Continuous improvement to MCS. In response to priorities set by the current Governor's administration, State staff continuously identify ways to modernize, update, and improve MCS for public benefit programs, including SNAP. Previously, much of the reporting on SNAP metrics such as churn and application volume was conducted manually. With an update to the structure of State data systems, this process has been automated, saving staff time and facilitating timely response.

> *Most of the [reports] were manual in the past, and now most of them are automated, and I think it's less worry for the staff in terms of maintaining records.*
>
> —SNAP State agency staff

Less time spent resolving cases of churn. Electronic notifications appear to help with churn and enable caseworkers to keep clients engaged and updated on their case. State staff can see when an electronic notice has been read through the kynect benefits website. According to State staff, online applications helped caseworkers process applications in fewer days compared with paper or in-person applications.

Changes to how caseworkers process applications. Frontline caseworkers reported participants could complete most elements of applications or recertifications on the website from their phone, but some components of the process, such as interviews, still could not be completed via mobile devices. A few documents still needed ink signatures and could not be signed electronically. However, MCS have decreased the duration of the full approval and recertification processes.

Since the improved kynect benefits website went live, the number of abandoned, withdrawn, and unsubmitted applications had decreased, and staff had seen an increase in successful recertification processing. Information technology (IT) staff perceived these changes to mean clients responded to notices and/or text messages telling them they were due for renewal by taking the necessary steps to renew and maintain their benefits. Previously, the case management system assigned each caseworker a particular caseload, but the agency now uses a queue system that operates more like a shared case management system. This change helped staff successfully adapt to the change in workflow resulting from online applications and recertifications.

4. Additional Resources Desired

At the conclusion of all interviews, stakeholders were asked about additional resources they thought would improve the usefulness of Kentucky's MCS for SNAP. Stakeholder responses included the following recommendations.

More competition among IT vendors. Stakeholders suggested encouraging more competition among vendors to give States more influence in the products they buy.

Additional resources and more latitude to invest in SNAP outreach about MCS. Stakeholders requested that FNS provide resources to invest in individuals who can conduct SNAP outreach, including finding families in need who qualify and helping them navigate the process of obtaining, using, and keeping benefits.

MCS implementation blueprint. A final request was for a blueprint for how to implement MCS from the ground floor and obtain specific funding intended for MCS development and implementation.

E. Feedback From SNAP Participant Focus Groups

The study team conducted two focus groups with 13 SNAP beneficiaries who had experience with Kentucky's MCS to understand their needs and experiences.

1. Participant Use and Awareness of MCS in Their State

Participants were more socially comfortable using their mobile devices because they were able to avoid in-person contact during the COVID-19 pandemic. They also saved time by not physically going into the office and saved money on postage by submitting their forms electronically.

Participants explained some SNAP recipients may not want to conduct SNAP business from a mobile device if they are concerned about data security, have poor internet connection where they live, or are generally uncomfortable with technology.

Most focus group participants were not aware that the SNAP office uses text messages to communicate about SNAP. All focus group participants had used the *kynect benefits* website via their mobile devices, and some had accessed it via computer.

Kentucky does not currently have a State-sponsored mobile app, but most participants had experience using the Providers app to check their EBT balance. Participants were surprised to learn the app was not sponsored by the State. The SNAP-related activities participants conduct on their mobile devices the most included checking their SNAP EBT balance, calculating eligibility, and uploading documents.

2. Participant Feedback on SNAP MCS

Although most participants had not experienced Kentucky's SNAP MCS text messaging feature, they provided helpful feedback about what they would expect from this feature and shared their experience with accessing the *kynect benefits* website from their mobile devices.

Text/SMS Messaging

Eleven of the 13 participants were unaware Kentucky used text messaging to communicate SNAP information. One participant explained she learned from her caseworker about opting in to text messages approximately a year ago. However, the caseworker expressed concern that the text messages were not reliable. This sentiment from the caseworker may have been from a time when there was substantial backend delays in the indexing of client paperwork because of influxes of document and application submission. This created a lag between when text messages were sent and when cases were processed.

One participant thought the text messages were useful but sometimes inaccurate. For example, sometimes she receives texts that she has a message in the *kynect benefits* portal but sees no message when she signs into her account. She noted it sometimes takes a couple of days after getting the text for the message to appear in her account. Another participant shared she would prefer that the text messages provide more detail about the action she needs to take rather than directing her to her *kynect benefits* account.

Participants who did not know about the text messaging option were asked if they would opt in now that they were aware of it. Slightly more than half of participants said they would not opt in to receive text messages. They thought they would unintentionally ignore the text message, they expected the message to not include enough information, they did not feel they needed reminders to check their account, and they did not trust the information in the text to be accurate.

Less than half of the participants stated they would opt in to text messages. Those who indicated they would opt in perceived text messages would be faster and more efficient than paper mail to learn when they needed to update account information such as income changes. They also stated that they found reminders helpful, and they felt they currently receive too much paper mail.

Mobile- Optimized Website

All participants provided feedback about their experiences with the kynect benefits website. Most participants learned about the kynect benefits website from the caseworker at their local office when they applied for SNAP or recertified. Other participants learned about it from friends, colleagues, or paper notices they received in the mail from the SNAP office.

SNAP-related activities participants conducted on the kynect benefits website included uploading documents, checking EBT balance, checking the status of their application or recertification, reporting household changes, and reading electronic notices.

Document upload. Some participants found the document upload feature easy to use, but others faced challenges. Some appreciated that documents could be uploaded directly from their mobile devices because they did not have access to a printer and a scanner. However, one participant found the prompts unclear and would have preferred if each required document had a description of what was accepted. Most participants also found the document upload feature slow, and one noted this process seemed to worsen during the COVID-19 pandemic, likely as a result of the large increase in the volume of online applications and document uploads. One participant disliked that the website could only accommodate one document upload at a time, preferring to upload all documents at once.

> *You can actually take pictures of all your documents and upload them on the website directly from your device—and that is amazing.*
>
> —SNAP participant

Application status. Participants' experiences checking their application status also varied. Some participants felt that the online submission process was straightforward and appreciated the ability to access forms uploaded in the past. This feature helped them track important documents without needing to upload them again. One participant shared they preferred paper applications to online applications but appreciated having both options. Some participants were frustrated that application status on the kynect benefits website was often not current. For example, the website displayed the application status as pending, and when the participant called to check the status, they were told their case was reviewed, meaning it was further along in the process than the website indicated. However, participants did clarify that they trusted that the website was more current than the paper mail they received, and they trusted that their application was going to the right place, rather than being uncertain about which physical office location they needed to send paper mail to.

> *I trust the portal more than I trust the mail because it will say, 'send it up to Frankfurt,' and I'll send it rather to my local office ... but I'd rather if I can do it on the portal ... that's a lot easier than having to try to send it.*
>
> —SNAP participant

EBT balance. One area of frustration for multiple participants was checking their EBT balance through the kynect benefits website. The lag between when the EBT card was used in a store and when the website displayed the updated balance was too long, discouraging participants from using it to check their balance. Instead, they turned to the Providers app. It was easier for them to open an app like Providers than to log in to the website from their phones to check their balance.

Website access on a mobile device. Participants preferred to access the website from their phones rather than a computer because they always had their phones with them, and some did not own computers or did not regularly have their computers on and ready to use. Participants shared that many instances of office closures (e.g., in response to snow or the pandemic) meant they had no physical way to access a computer or the local office, so it was necessary to be able to access the website from a mobile device.

Although participants had mixed experiences with some of the features on the kynect benefits website, overall, they felt it helped them manage their SNAP benefits.

> *Even if you had to make that phone call, at least you didn't have to start at step one. ... They can pull up what you've uploaded.*
>
> —SNAP participant

3. Features of Most Interest to SNAP Participants

Participants were given a list of MCS features and asked to indicate which features they were most interested in having for SNAP-related activities. The activities of most interest were submitting documentation, chatting online with customer service, checking application status, and submitting questions. Of these features, Kentucky's SNAP-related MCS currently offers only the documentation submission and application status features.

Participants also enthusiastically shared an interest in the ability to conduct interviews online via video (e.g., using Zoom). Participants agreed they would take advantage of a full-service mobile app that enabled users to conduct the same business as the website.

Impact of COVID-19 Pandemic on MCS

The COVID-19 pandemic demonstrated the value of having MCS available to SNAP participants and generated more demand for these tools.

- The closure of local SNAP offices created a need for a mechanism to continue managing SNAP benefits electronically; the functionality of the mobile-optimized website and text messages helped minimize barriers to accessing SNAP benefits.
- The volume of SNAP applicants increased substantially during the early stages of the COVID-19 pandemic, which created a larger than expected demand on caseworkers and IT systems. The pandemic forced the SNAP State agency to update the systems that process SNAP participant documentation and improve indexing to ensure applications could be processed correctly.
- Communication about pandemic-related changes to SNAP benefits was easier to disseminate via MCS; paper mail could create confusion because of lag time from when an account change happened to when the participant received notification of the change. Pandemic-related updates to benefits were more readily circulated to SNAP participants via text message and electronic notices within the kynect benefits website.

F. Lessons Learned from MCS Implementation

The findings described in this case study report provide an overview of the successes and challenges Kentucky experienced implementing SNAP MCS. From these findings, table 1 presents lessons learned for successful MCS implementation.

Table 1. Lessons Learned from MCS Implementation in Kentucky

Leadership Support		
Obtain buy-in from leadership. In Kentucky, prioritization from leadership was integral to ensuring adequate resources were allocated for designing, implementing, and maintaining MCS.		
MCS Marketing and Outreach		
Market with intention. In order to encourage clients to use the MCS, MCS marketing and related outreach should be carefully planned before implementation and should include clear descriptions of the activities clients can conduct using these tools.	**Use social media.** The wide reach and low cost of social media facilitate communication with eligible citizens about SNAP benefits and other social safety net programs for which they may qualify. When new modes of MCS and new features within the MCS are implemented, social media can alert SNAP clients about them.	**Consistently engage community partners.** Community partners offer expertise and access to SNAP participants and SNAP-eligible individuals. These partners have a unique understanding of the needs of SNAP participants and can offer invaluable feedback on MCS design and outreach.
Comprehensively train caseworkers on MCS functions. Ensure local staff and caseworkers are trained on the full range of activities that can be conducted via the State's SNAP MCS. Caseworkers are one of the most common ways SNAP beneficiaries learn about MCS, and they are often called upon for help with using MCS.	**Combine MCS for SNAP with MCS for other social safety net programs.** When possible, combine MCS for SNAP with MCS for other social safety net programs such as WIC, TANF, and Medicaid. Maintaining multiple programs on one platform streamlines the back-end data requirements and facilitates communication with beneficiaries who may be eligible for more than one program. Combining programs on one platform also minimizes burden on beneficiaries enrolled in more than one program by consolidating the documentation they need to provide.	**Ensure legacy forms of communication remain available.** Although MCS can streamline processes for SNAP beneficiaries and caseworkers, various subpopulations have limited or no access to broadband, smartphones, printers, or email. It is important for these individuals to still be able to conduct SNAP-related activities in person and via paper.
Community Partner Engagement		
Hold frequent, regular, and ongoing meetings with community partners. Community partners work directly with SNAP participants, who are the end users of the State's MCS. The importance of community partners' perspectives on what will and will not work in the design, implementation, and continuous improvement of MCS cannot be understated.		

Software and Data Systems Development

Engage a wide variety of experts. Ensure all experts are involved in the design, implementation, and maintenance of MCS. Involving necessary experts such as software developers, IT infrastructure experts, policy experts, community partners, and content experts will enhance the State's ability to resolve any issues that arise during implementation.

Perform comprehensive testing and documentation. Allocate sufficient time for testing and documenting technical issues that arise. When users experience errors, they lose trust in the system, which inhibits the utility of MCS. Ensure all issues are documented comprehensively to facilitate long-lasting improvements.

Integrate IT systems with other social safety net programs. Integrating IT systems across multiple social safety net programs creates efficiencies for data management and security.

MCS Evaluation and Monitoring

Apply MCS analytics to address facilitators of churn. Tracking the read rates of electronic notices can help identify if alternative communication strategies are necessary to forestall instances of churn. This information can be used to alter methods of communication with SNAP clients who may miss electronic notices and would benefit from paper notices in the mail.

Seek continuous improvement to MCS. Improvements to MCS need to be continuous and consistent across all modes. All changes to electronic notices should apply to email and paper mail. Engaging stakeholders who interact directly with SNAP beneficiaries (e.g., community partners, caseworkers) increases the likelihood of meeting beneficiaries' needs.

Solutions to Implementation Challenges

Minimize bureaucratic steps to each business process. Assess the utility of certain bureaucratic requirements to make meaningful improvements to MCS and take steps to minimize barriers to ensure continuous improvement is possible.

Hire authorized aides like "kynectors" to help with applications. Partner with individuals and organizations who can promote MCS and help SNAP beneficiaries learn to use them. The positive impact of these authorized individuals is supported by literature that found consumers who received in-person assistance were more than twice as likely to successfully enroll in social safety net programs than those who tried to enroll online without any assistance, and those who received local assistance were the most successful.[5]

Improvement of State Operations

Use a queue case management system. Kentucky found that assigning cases when they come in and as certain parts of the application are processed is more efficient than assigning each caseworker to manage a set number of cases at various stages in the approval process.

[5] Grob, R., & Schlesinger, M. (2015). Educating, enrolling, and engaging: The state of marketplace consumer assistance under the Affordable Care Act. *Health Affairs, 34*(12).

Appendix C.1.a. List of MCS Features Offered to Focus Group Participants

At the end of each focus group, participants were asked to review a list of potential features offered through MCS. They were then asked to indicate the top features they were most interested in with their SNAP MCS. The list they reviewed is listed below.

- Check your application status
- Use an eligibility screening/income benefit calculator
- Start, save, and submit your application
- Submit documentation about your case
- Communicate electronically with eligibility worker
- Schedule interview
- Report household change
- Report income change
- Receive notifications about any verifications needed
- Receive notifications about your certification or account changes
- Check a calendar of SNAP-related due dates/receive due date reminders
- Review information in a language other than English
- Check EBT balance
- Request and EBT card replacement
- Manage your EBT PIN
- Chat with customer service
- Review FAQs
- Locate community partners/resources
- Check office hours/locations
- Submit questions

Appendix C.2. Massachusetts Case Study Memorandum

Modernizing Channels of Communication With SNAP Participants

insight
POLICY RESEARCH

Modernizing Channels of Communication With SNAP Participants Massachusetts Case Study Report

FINAL

April 6, 2023

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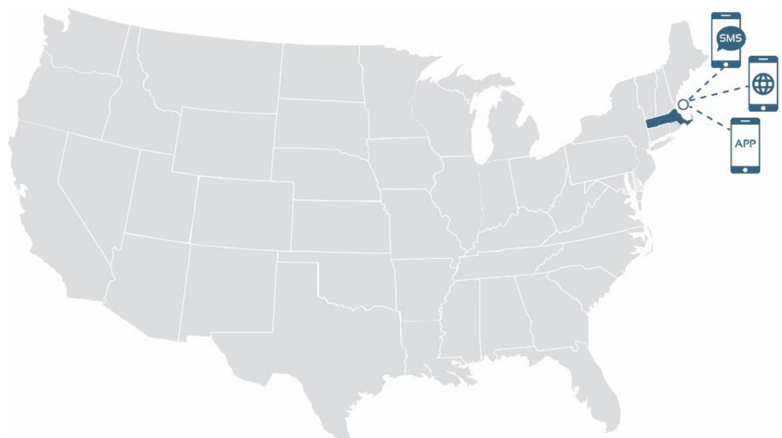
A. Overview of the Study

The primary purpose of the Modernizing Channels of Communication With SNAP Participants Study is to highlight best practices and lessons learned from various mobile communications strategies (MCS) implemented by the Supplemental Nutrition Assistance Program (SNAP) State agencies. For the purposes of this study, MCS include websites optimized for mobile devices, apps for mobile devices, and SMS/ text messaging. Through five case studies, the study sought to examine the experiences of five States related to the development, implementation, and maintenance of MCS. The case studies complement other elements of the study aimed to provide an overview of MCS activities in all States, gather client perspectives on MCS, and synthesize best practices.

Mobile Communication Strategies in Massachusetts



To understand best practices and lessons learned from each State's MCS implementation, the study team interviewed key stakeholders, including SNAP State agency staff, community partners, local caseworkers, and third-party vendors, about their roles in the implementation process between August and October 2021. The study also captured SNAP participants' perspectives through two virtual focus groups with SNAP participants in each of the five States.

This memorandum highlights the findings from the Massachusetts' case study, including an overview of Massachusetts' MCS, goals and target audiences for MCS, feedback from stakeholders, and a summary of perspectives from SNAP participants who use MCS. The findings were compiled using detailed analyses of interview and focus group data.

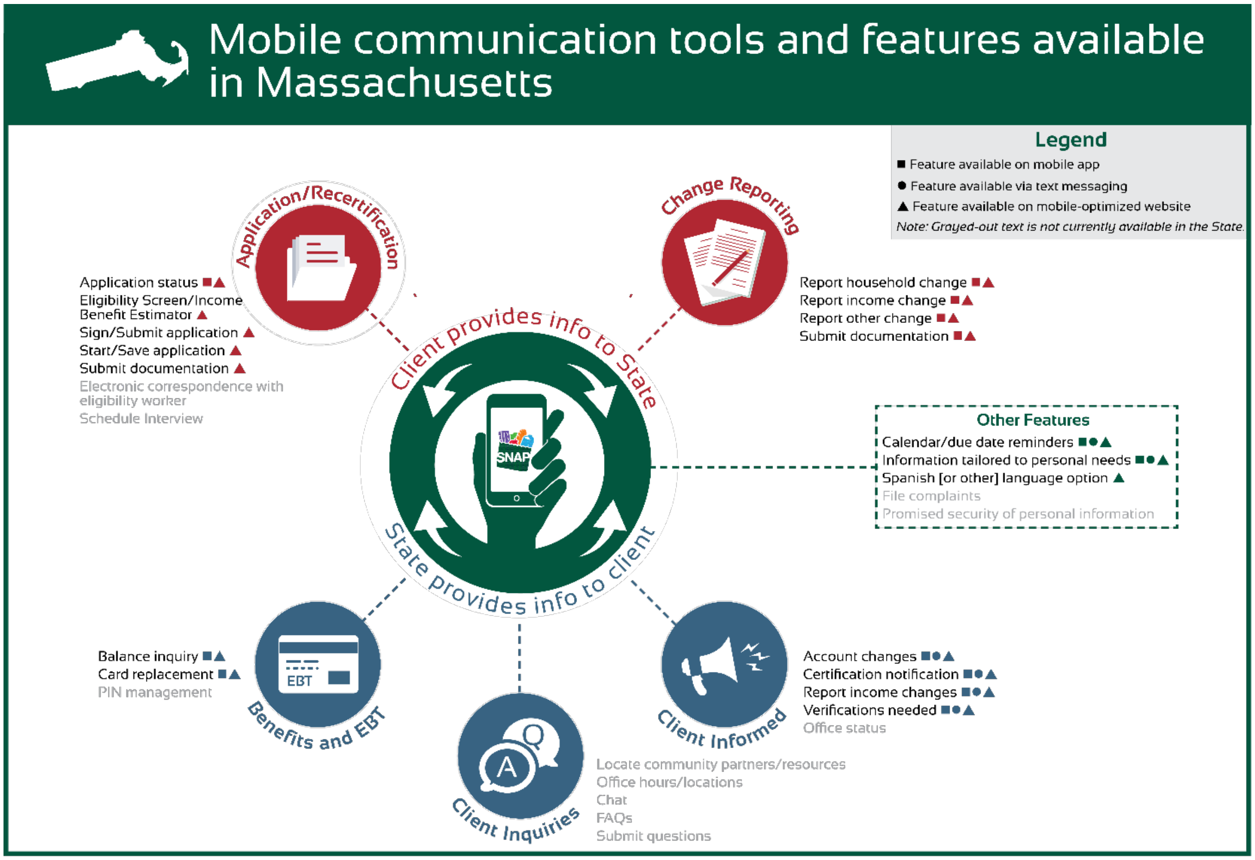
B. Overview of Massachusetts' Mobile Communications Strategies

At the time this case study was conducted (summer and fall 2021), the State of Massachusetts maintained a mobile-optimized website, a mobile app and also used text messaging for SNAP communication and SNAP-related activities. This section describes the functions and purpose of the MCS available to SNAP participants in Massachusetts.

1. MCS Available in Massachusetts

Several components of Massachusetts' SNAP MCS operate in tandem with other social safety net programs that are a part of the Department of Transitional Assistance (DTA), such as Transitional Aid to Families with Dependent Children (TAFDC) and Emergency Aid to Elderly, Disabled and Children (EAEDC). Although SNAP is independent from these other social safety net programs, the goals, target audiences, and functional components of Massachusetts' MCS often overlap. Figure 1 depicts MCS functionality.

Figure 1. Mobile communication tools and features available in Massachusetts



Mobile- Optimized Website

DTA, the agency that operates the Massachusetts SNAP program, maintains the mobile-optimized website called DTA Connect.

Functions and purpose. The mobile-optimized website allows clients to start and save their application, check eligibility, and check application status. Applications for EAEDC and TAFDC are also available on the DTA Connect website. Clients can also get case information and update contact information. The website also allows clients to submit documentation. Clients are informed through the website if the documents that have been sent to the State SNAP agency have been processed. During the COVID-19 pandemic, the State SNAP agency added a function that allowed clients to request and track replacement EBT cards sent through the mail.

Text/SMS Messaging

SNAP participants in Massachusetts are automatically enrolled to receive one-way text messaging about their SNAP case.

Functions and purpose. The State SNAP agency uses text messaging to notify clients about case-related actions, including missed appointments, case status, and reminders for required documents and verifications. Prior to the COVID-19 pandemic, clients only received text messages that were disseminated to the broader SNAP population rather than tailored to an individual's case. Users are automatically opted into receiving text messages and must opt out if they do not wish to receive them.

Mobile Apps

Like the DTA Connect website, SNAP participants also have the option to conduct business via a mobile app also called DTA Connect.

Functions and purpose. The DTA Connect mobile app allows clients to view case information, request and track EBT cards, appointment reminders, case updates, check EBT balance and upload documents. Clients are also able to make updates to their account, including address, phone number, and email address changes.

The DTA Connect app was launched in 2016. Most activities that are offered on the DTA Connect app are also offered on the website. However, the website has some additional functions that are not available on the app, like the ability to submit applications and recertifications.

Use of third-party applications for SNAP. Clients can use the Providers app (previously called Fresh EBT) for instant updates to EBT balances across social safety net programs. This app is not managed by the SNAP State agency but is popular among SNAP recipients.

C. History and Implementation of Massachusetts' MCS

To understand the history of MCS in Massachusetts, the study team asked key stakeholders for their impressions of the implementation, continuous improvement, and utility of Massachusetts' MCS. This section details stakeholder perspectives about the impetus for MCS development and improvement, specific SNAP audiences the State targets, marketing and outreach strategies, popularity and uptake of MCS, involvement of community partners, software infrastructure development, evaluation and monitoring of MCS for continuous improvement, and implementation challenges.

Prior to the implementation of MCS, Massachusetts saw a significant decline in SNAP participation due to State administrative errors. In 2015, the Governor's administration aimed to improve SNAP service delivery by ensuring that eligible clients were able to enroll and stay on the program. One of the administration's strategies for accomplishing this was to prioritize mobile access for SNAP recipients. The mobile app was developed as a new resource for clients to manage their case information. The website was then developed to increase accessibility for clients who lacked access to smartphones. Stakeholders credited the DTA Commissioner during the MCS implementation for moving the agency forward and actively engaging with community partners throughout the design and implementation process.

1. Goals for Massachusetts MCS

The primary goals for developing and improving Massachusetts' MCS included improving clients' experience with and access to SNAP and reducing churn.

Improving client experience with and access to SNAP. MCS aims to increase SNAP accessibility by increasing efficiency and streamlining the application process. Prior to the development of MCS, clients would have to call local SNAP offices or community-based organizations (CBO) to have their SNAP questions answered. State staff reported that clients would often spend a significant amount of time on hold waiting to have their questions answered. MCS streamlined the process by allowing clients to access information about their application status and other account information rather than having to call into the office.

Reducing churn. Another way to improve client access to SNAP benefits is reducing churn. Churn occurs when a SNAP participant exits the program for a period of time and then has to reapply for benefits. Participants can lose or have a lapse in their benefits because of procedural issues or miscommunication. Churn is a significant concern among State SNAP agency staff. Processing documentation to solve this issue is administratively burdensome for participants and caseworkers. The website and app provide a faster and easier way for clients to upload required documentation. Text messaging increases clients' awareness of deadlines by sending out reminders of when documents and verification information are needed.

2. Target audience

While Massachusetts' MCS for SNAP are intended for all SNAP and SNAP-eligible participants, the State SNAP agency considers certain subpopulations, including clients who are familiar with technology and clients who need reminders about action required on their case, especially likely to benefit from these practices.

Clients who are familiar with technology. Stakeholders noted that many of their clients already use technology in other areas of their life. This made for a seamless transition to managing their SNAP benefits through MCS.

Clients who need reminders. Some clients have difficulty managing their case information and knowing when they need to renew or provide additional information about their household. During the COVID-19 pandemic, the State SNAP agency expanded their use of text messaging to include individual case-based text messages. Text messages are used to confirm receipt of application, request additional documents, and notify households about recertifications. Mass text messages are also used to update all SNAP clients on issues such as vaccine updates, child tax credit expansion, and emergency broadband benefits. One CBO noted these messages provided additional clarity for clients and helped them stay informed about their benefits.

3. Marketing and outreach strategies

Massachusetts State SNAP agency deployed various strategies to inform and encourage SNAP participants to seek out MCS available to them. These strategies included paper notices, word of mouth, and promotional materials developed by a marketing firm.

Community partner outreach. State staff reported that they worked with over 100 different outreach partners in the community to disseminate information about MCS in the State. This included distributing flyers and talking points so that partner organizations could inform their clients of the MCS.

Word of mouth. When caseworkers interacted with clients, they would inform them of MCS and SNAP related activities that could be performed. If a client came into the office and was unfamiliar with MCS, caseworkers would walk them through the process of downloading it and using it to manage their accounts.

Marketing firm created promotional materials. Massachusetts State SNAP agency received grant funding to promote that the online application was multilingual. The State worked with a marketing firm to develop rack cards, posters, and promotional videos which were sent to schools and libraries.

4. Popularity and uptake of MCS

According to stakeholders, the app was more popular than the website because most clients were comfortable using smart phones and the login process was easier than the website. Stakeholders also reported an increase in the use of the app and website during the COVID-19 pandemic.

Mobile app popularity. Overall, the mobile app was described as more popular than the website because the app had been around longer and the process for logging in was more user friendly. The mobile app required clients to enter their Social Security number and birthdate, whereas the online portal required participants to create an account using an email address and there are subsequent steps of linking newly created accounts to SNAP records. The mobile app was also cited as being more popular because many SNAP households access their account information through smart phones rather than through a computer; those who don't use a smart phone use their computer to access the portal via the website. One IT Staff reported that there have been about 800,000 downloads for the app. The most commonly used features on the app include checking EBT balance and submitting documents.

> *I think it was filling a need that it's very real for clients. Many clients felt like they couldn't access the information they needed to track their case. So, I think that tool being available was very appealing to people.*
>
> —Community partner

Effects of the COVID-19 pandemic on uptake. The closing of local offices as a result of the COVID-19 pandemic led to an increased use of MCS. One CBO reported that right before the COVID-19 pandemic, nearly half of the applications their clients submitted were completed online; this increased significantly with the onset of COVID-19.

5. Involvement of community partners and other stakeholders

The Massachusetts State SNAP agency worked with multiple stakeholders during the development and implementation of MCS. Since the implementation of Massachusetts' MCS, the State has continued to engage CBOs to improve MCS functionality and outreach.

> And I personally found that tremendously useful because for two reasons, one these are folks that are navigating our systems every single day on behalf of clients, so their feedback is critical. And two they were probably going to ask us for those changes anyway, so it's better to get it on the front end, before we launch.
>
> —IT Staff

Coalition Group. The State SNAP agency regularly meets with community partners as a part of a coalition group. When MCS were being developed, State staff reported meeting with the coalition group weekly to test and provide feedback before the MCS were launched. The State SNAP agency continued to meet with community partners to obtain continuous feedback on what features work well and offer suggestions for improvement after the MCS were launched. State staff, community partners, and IT staff emphasized the importance of involving community partners and advocates throughout the process.

> I think asking for input has been really huge. We work very directly with people and hear the concerns and the issues that people have with accessing benefits. So, I think asking us for input is key I think that has worked well when they have involved us in the process.
>
> —Community partner

6. Software and Data Infrastructure

The planning and development of Massachusetts' MCS were primarily completed by the State SNAP agency with consultation from experts in the field. In 2014, the State SNAP agency completed a process redesign wherein they assessed their old service model and made several changes, including creation of a mechanism for clients to submit documents electronically. To better serve clients, the State SNAP agency thought it may be necessary to provide more self-service options. In 2016, a consultant conducted a study and determined that most SNAP clients who visited local offices used smartphones. This led to the development of the app, which took about a year to create. The website followed and was developed within about 6 months; text messaging took about a month to be developed.

Developing and managing infrastructure in-house. State IT staff felt it was important to manage the development and improvements to MCS in-house because of the ability to tailor the tools more closely to the State's needs. As one IT staff member explained, "I think it works well if the state takes the lead or if the state in the sense of the state IT department or the state agency takes the lead in driving this whole exercise and then setting up goals for any partners and leading it to completion."

Feature selection. The State SNAP agency regularly assesses barriers for clients and staff and takes steps to address these barriers. When the agency first began developing MCS, they analyzed the reasons clients were calling the assistance phone line; their intent was to determine if they could reduce call volume and meet client needs via a self-service app. This analysis led to the first iteration of the app, which allowed clients to look at their case information, receive real time EBT balances, and receive other notices through the app. MCS features continue to evolve based on analysis of client's needs, which is typically done through focus groups with clients and community partners.

Upgrading the online portal. Massachusetts previously had an online application called the Virtual Gateway that was associated with Medicaid. Stakeholders described this as being an overly complex way of applying for SNAP benefits. One of the main drivers of updating the portal was recognition that only one-fifth of applications started online through the Virtual Gateway were completed. The State SNAP

> One is monitoring of the services that we provide. What is the pain point? The pain point is on the IVR [Interactive Voice Recognition] is there a huge wait time? How do we minimize the wait time? We do all those analyses and we say how best to address it.
>
> —IT Staff

agency engaged with various stakeholders to identify the pain points in the process and what could be done to resolve them. This led to the development of the DTA Connect website, a more comprehensive web portal that is mobile responsive, ADA compliant, and section 508 compliant.

User acceptance testing. IT Staff explained that they would develop complex scenarios for community partners to use while testing the application on the portal. Various computer programs were used to stage complex data problems for this phase of testing. The testing allowed IT staff to identify any defects in the application and ensure that it would work properly for various family scenarios.

Streamlining client experience through text messaging. The State SNAP agency implemented comprehensive text messaging as an additional way to keep clients updated on their case. Once an application is submitted and processed, clients are sent texts at each phase of the application's lifecycle.

Website and app features. IT staff have prioritized making the features offered through the app and website interchangeable when possible.

Data Security. All IT changes that are planned need to be cleared by the Chief Security Office (CSO). The CSO includes an application security office and data security office that ensures the data and security compliance of all systems. In addition, the Commonwealth Technology Secretary's office provided an identity access management tool called Centrify that was needed to ensure data security across all the MCS tools. Once the security features were implemented, IT staff met with the DTA legal team to ensure they were meeting Federal and State laws surrounding data security. IT staff noted that the process for ensuring security compliance was challenging because the data had to be secured from several different data security offices, all with different compliance requirements for how it is stored and shared.

Currently, data is stored in a physical location with all other DTA IT infrastructure. There are plans to transfer the data to a government cloud server because of the increased flexibility with storage capacity.

7. Evaluation and monitoring of MCS

As discussed in section 5, the State SNAP agency regularly engages stakeholders to gauge the success and limitations of Massachusetts's MCS. In addition to conducting user acceptance testing, they also conducted a study to evaluate the usability of the website and regularly review website analytics to understand how partners use the app.

Evaluating usability of website. The Massachusetts Executive Office of Technology Services and Security (EOTSS) conducted a study to assess what clients thought about the DTA Connect website. The study found that clients did not think the website was run by the government because it did not have a similar design format as other State websites. This led to the State SNAP agency redesigning aspects of the website, including adding the mass.gov logo to the website in a prominent spot.

DTA Connect portal tracks applications. The DTA Connect portal can track the number of applications submitted by organizations on behalf of their clients. The State SNAP agency receives quarterly reports with this information, which allows them to see if partner organizations are properly submitting the applications.

8. Implementation challenges

> *But I think just from a pure like legacy-based eligibility system piece, a lot of the good work that has been done over the past six years has taken a really long time to be completed, because it takes a really long time and antiquated systems without robust IT resources to be able to get from A to B.*
>
> —Community partner

As expected with most new initiatives, there were challenges associated with the development and implement of new MCS.

State bureaucracy. State and CBO staff said that implementing a large IT project such as MCS with limited financial resources, IT infrastructure resources, and changing priorities was challenging. This sometimes resulted in delays in implementation or updates to MCS with potential direct impact on clients. One stakeholder noted that the State had been planning for several years to implement a more robust text messaging system that include more individualized case-based text messages to clients. However, it was not until the COVID-19 pandemic and the mass influx of applications that the State prioritized implementing this change.

D. Perceived Benefits and Limitations of MCS Features

Stakeholders shared what they perceived to be the benefits and limitations of Massachusetts' MCS and offered their perspectives on resources they believe would help streamline SNAP business via MCS tools.

1. Perceived Benefits

Overall, stakeholders agreed that Massachusetts' MCS were beneficial to clients for the following reasons.

> *...This tool is helpful for our organizations working with us... they can easily monitor cases and therefore our clients have the opportunity to stay on benefits for a prolonged time without interruptions, because they get notifications when a case is about to close or if there's any documentations missing.*
>
> —State Staff

Reduces churn. SNAP participants may struggle to submit required documentation to SNAP offices on time due to various barriers (e.g., work schedules, lack of transportation). Allowing clients to apply or recertify through the online portal facilitates enrollment and prevents lapses in benefits. Push notifications from the mobile app and text messages inform clients when actions are required for their recertification.

Improves application processing time. Applications that are submitted online can be processed faster than those that are mailed or submitted in person at local offices. State SNAP agency staff reported that they're often able to fully process applications submitted online within 48 hours.[6]

Facilitates information dissemination to clients. Prior to MCS, clients would have to spend time on the phone asking caseworkers questions about their case. The app and website allow clients to quickly access their case information. Text messages also offer an additional means for clients to stay up to date on case information.

[6] Note: Under the Families First Coronavirus Response Act, States could request additional flexibilities to make it easier to apply for and issue SNAP benefits to ease program operations and protect the health of participants in response to COVID-19. As a result, some SNAP application processes may have been temporarily waived or adjusted, which could have also impacted case processing times.

Allows continuous services during COVID-19. Having MCS tools developed and implemented prior to the onset of the COVID-19 pandemic allowed the State to easily transition to a virtual platform. Clients and staff were already familiar with conducting SNAP related business virtually.

2. Perceived Limitations

Although stakeholders overall approved of the usefulness of Massachusetts' MCS, some limitations were noted.

Lack of some desired functionality. At the time of the study, Massachusetts's SNAP clients were unable to live chat with case workers, easily reset their account password, view submitted verification documents, or view electronic notices in languages other than English or Spanish. Clients were also unable to submit applications through the mobile app, which was reported to be more popular than the online portal.

Need for clarified language. Stakeholders reported that clients were frequently confused by the language used for MCS. This resulted in clients having to call into local offices or CBOs to have the notice explained to them. Elderly clients found the text messages they received to be particularly confusing because it was unclear which were case-specific text messages and which were mass text messages sent out to the entire SNAP population. As one community partner noted, "I think some of DTA's language feels a little bit coded; you have to have some insight or knowledge to really understand what that actually means is happening with their case."

Security and data privacy concerns. Some clients are hesitant to conduct SNAP-related business through the mobile app or internet because of security and data privacy concerns. This was particularly common while using the app because a Social Security number is required for login.

3. Effects of MCS on State and local operations

The implementation of Massachusetts' MCS affected the way State staff and local caseworkers conducted SNAP-related business by increasing local staff efficiency and requiring additional resources to be allocated to IT staff.

Increased efficiency for staff. The online portal and mobile app allow local staff to focus on clients who need the most assistance and other high priority tasks. Submitting applications through the online portal saves local staff time from having to scan documents and enter data into the eligibility system. Documents and applications submitted through the portal are electronically entered into the State's eligibility system rather than manually entered like applications received in person or through the mail. As one State staff also noted, providing case information on the mobile app decreased the number of individuals who were calling caseworkers to ask basic questions about their case.

> *It just allows us to provide better customer service instead of having people call and wait for like for a long period of time just to ask a question that the platform could provide them the answer to.*
>
> —State Staff

Additional IT staff and resources. Although the use of MCS did increase efficiency among caseworkers, State staff noted there was an increased need for IT resources to provide customer services to clients specifically related to portal and app challenges (e.g., login issues). Designated staff needed to be assigned to work on these types of IT support.

4. Additional resources desired

At the conclusion of all interviews, stakeholders were asked if there were additional resources that they believe would improve the usefulness of Massachusetts' MCS for SNAP. Stakeholder suggestions included testing MCS readability with partner organizations, creating a system for States to share MCS solutions, increasing the types of documents that can be verified upon receipt, and expanding language access.

Testing MCS language with partner organizations. Although Massachusetts' State SNAP agency engages CBOs and partner organizations in the testing of MCS, caseworkers noted that it would be useful for caseworkers to be more involved in the testing of MCS. They explained that they could provide recommendations on the readability of the language that is used for MCS because of their experience frequently clarifying them to clients.

Create a system for States to share solutions. Stakeholders reported that it would be helpful for FNS to create a public sharing space where IT staff from different States could share their code and any solutions they may have to IT challenges. This would allow States to easily share best practices and make desired upgrades to their own MCS system.

Verified upon receipt. IT staff reported that it would be helpful if FNS could expand the number of data sources that could be considered verified upon receipt.

Expanded language access. Stakeholders noted the importance of expanding MCS to as many languages as possible. A CBO specified that it was particularly important to ensure that the languages that paper and electronic notices are offered in align with the DTA online application and text messaging.

E. Feedback from SNAP Participant Focus Groups

The study team conducted two focus groups with a total of 11 SNAP beneficiaries who had experience with Massachusetts' MCS to understand their needs and experiences.

1. Participant use and awareness of MCS in their state

All participants were aware of the mobile app and the website. Participants were also aware that they could access the website through a mobile device or tablet, and some said they preferred these methods over accessing the website via a computer. Participants learned of the website and mobile app in a variety of ways, such as from friends, caseworkers, or the State website. Almost all participants were aware of the text message communication system with the SNAP office.

When asked to share what SNAP-related activities clients would use a mobile device or tablet to complete, participants shared that it was convenient and allowed them to avoid in-person contact during the COVID-19 pandemic. Participants suggested a client might not be interested in using a mobile device or tablet because of privacy concerns, limited technological proficiency, and preferences for human interaction.

2. Participant feedback on SNAP MCS

The study team asked participants to share their experiences with the MCS available in Massachusetts. Participants provided insights and suggestions for improvement based on their interactions with text messaging, the website, and mobile app.

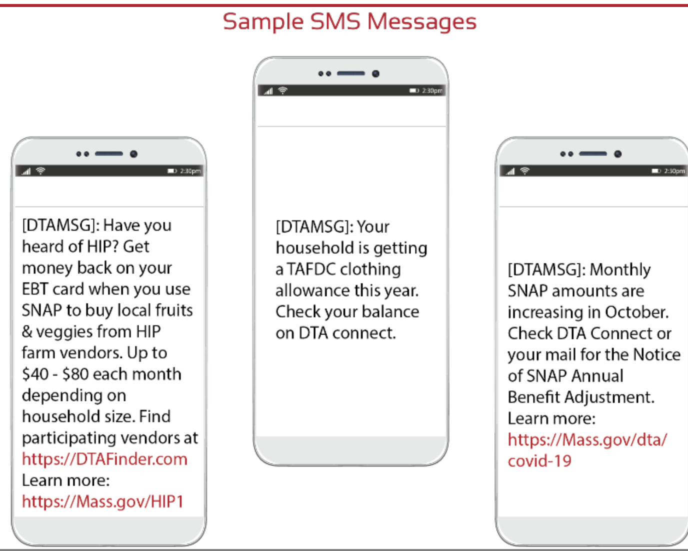
Text/SMS Messaging

> *I don't feel like I get bombarded with them... I find them helpful...I like getting the one reminding me about the balance or that I'm getting the benefit every month because I can't remember when I'm getting it.*
>
> —SNAP participant

Almost all participants were aware of or had experience with receiving text message communication from the SNAP office. Only one participant reported never receiving texts and said he would not want to receive text notifications due to privacy concerns. Another participant eventually unsubscribed because she found the texts repetitive and unnecessary because the mobile app provided the information she needed. Otherwise, most participants found the text messages to be helpful and infrequent enough to not feel overwhelmed. Participants shared that they appreciated the reminders about missing documentation and recertification because it prompted them to act. Participants also felt that texts provided useful information about other social safety net programs and COVID-19 pandemic resources.

Participants were asked to review and share feedback about a set of sample text messages (see figure 2). Many participants shared that they are hesitant to receive texts or open links from unknown numbers, but by leading each text with [DTAMSG] and including *https://mass.gov* in the short link, they felt confident the texts were coming from a reliable source. Some participants noted the text messages were long. However, participants also acknowledged that the texts were informative, which justified the length. One participant recommended ensuring the notification system is connected to account changes to reduce delays sending current information to clients.

Figure 2. Sample text messages about applications and account changes



Mobile- Optimized Website

Seven of the 11 participants indicated that they had accessed the SNAP website on a mobile device. Some participants did not use the site or find it to be useful because the app has greater functionality.

These participants viewed the website as a "back up" in the event that the app was not available. For example, participants admitted they relied on the website for tasks like recertification and finding contact information, as it cannot be completed through the mobile app.

Appearance of website. Participants that had experience with the website indicated they did not like the design. One participant explained that the site tends to be text heavy, which makes it hard to read from a mobile device's smaller screen. Other participants found the number of hyperlinks on each page to be unclear and excessive.

Information provided. Although participants expressed frustrations with the website's readability, they all found the vast amount of information available on the website helpful for learning more about their SNAP benefits and other social safety net programs.

Mobile Apps

All participants provided feedback about their experiences with the DTA Connect mobile app. Some participants began using the mobile app during the pandemic, while others had several years of experience with the app. The features most used by participants were balance inquiries and uploading documents.

EBT balance. All participants appreciated that the balance was the first available piece of information upon logging into the app and found it useful to pull up when shopping. However, several participants noted that the benefit balance and renewal dates were often not current. Participants also wished they were able to view their most recent transactions as to avoid calling to inquire.

Document upload. Overall, the experiences with uploading documents were inconsistent among participants. Some found it helpful and straightforward whereas others had trouble with the feature. Several participants appreciated receiving confirmation once they successfully submitted documents. However, one participant felt the feature was not intuitive because they had trouble with uploading documents and needed to call for assistance. Another participant said that the document upload feature was unavailable for them in the mobile app, and that they have to mail or fax documents to their local SNAP office. It is unclear why this participant was unable to upload their documents and may be specific to the type of device they used.

> *I also think it's a potential problem that you have to type in your whole social security number every time. And you know, what happens if you drop your phone and someone else picks it up and happens to see what you've typed? I think they should require a piece of your social security number, not the whole thing.*
>
> —SNAP participant

Areas for improvement. While the app was the preferred MCS among participants for conducting SNAP-related activities, participants had suggestions for improvement. Participants felt the log-in process on the app was "tedious" and "intrusive." One participant suggested only having to enter the last four digits of their SSN instead of the entire number to ensure data security and save time. Participants also suggested in-app notification features, such as a banner that displays the last log-in across the top of their screen, and push notifications or text messages that notify them of recent transactions. Participants noted that those are features that are integrated into their online banking apps and helps them feel confident their data is secure.

3. Features of most interest to SNAP participants

Participants were given a list of MCS features and asked to indicate which features they were most interested in having for SNAP-related activities (see appendix C.2.a.).

The features of most interest were: balance check; chat with customer service; and request an EBT card replacement. Of these options, Massachusetts' SNAP-related MCS currently offers the balance check feature and the ability to request an EBT card replacement but does not have the option for clients to chat with customer service.

Impact of COVID-19 Pandemic on MCS

The COVID-19 pandemic demonstrated the value of having MCS available to SNAP participants and generated more demand for these tools.

- When the closure of local SNAP offices created a need for a way to manage SNAP benefits electronically, the mobile-optimized website and mobile app minimize barriers to accessing benefits.
- The increased volume of SNAP applications prompted the expansion of text messaging so that clients could receive case-specific messages. These text messages allowed caseworkers to quickly send updates to clients about their case rather than having to spend time providing information over the phone.
- Popularity and uptake of SNAP MCS increased in response to the COVID-19 pandemic. Stakeholders shared that the number of online applications being completed online increased significantly.

4. Lessons Learned from MCS Implementation

The findings described in this case study report provide an overview of the successes and challenges Massachusetts experienced while implementing SNAP MCS. Table 1 presents lessons learned for successful MCS implementation.

Table 1. Lessons Learned from MCS Implementation in Massachusetts

Stakeholder Engagement and Communication		
Engage with community partners for feedback frequently. Community partners work directly with SNAP participants, understand their needs, and concerns around accessing benefits. These partners can offer feedback on MCS design and outreach, which may save time and resources in the future if utilized early in the development process. Forming a coalition group allows community partners to provide regular feedback on the development and implementation of MCS.	**Engage SNAP participants.** Engaging SNAP participants during the development and implementation of MCS is critical to building a user-friendly tool. SNAP participants should be recruited to provide input on functionality prior to the implementation of the MCS if possible.	**Task community partners with promoting MCS.** Utilizing existing relationships with community partners allows for an inexpensive method of promoting MCS.

Software and Data Systems Development	
Tailor MCS IT infrastructure and features to specific State needs. States should assess the specific needs of the SNAP participants in their State and develop MCS and IT infrastructure that meets those needs. Adopting the MCS and infrastructure of other States may not adequately address the unique needs of the State's SNAP clients.	**Consistently monitor and make improvements.** MCS must evolve to best address clients' needs. Conducting focus groups with clients and community partners and systematically analyzing feedback is an effective way of evaluating MCS features and functionality.

Important MCS Features	
Personalized text messaging. Use text messages to provide additional reminders on case-specific information to clients, such as appointment notifications, reminders for required documents, and updates on application status. This feature can help clients stay informed of their case and decrease churn.	**Limit mass-audience text messages.** Although text messages can be a useful way to update SNAP participants about important information, too many text messages can be overwhelming for clients leading them to ignore most messages they receive. Limiting the number of mass-audience text messages will improve the utility of each text message clients receive.
Simplify login process for mobile app and website. The process for logging into the mobile app and website should be simple. The process for setting up an account on the website should only require participants to enter a username, password, and security questions. Clients should also be able to log-in to the mobile app without revealing sensitive information, namely SSN.	**EBT Balance.** Ensure the accuracy and currency of the balance inquiry feature. When SNAP clients do not see an updated balance shortly after using their EBT card, they do not accept that feature to be reliable, thus rendering that feature ineffective.

Appendix C.2.a. List of MCS Features Offered to Focus Group Participants

At the end of each focus group, participants were asked to review a list of potential features offered through MCS. They were then asked to indicate the top features they were most interested in with their SNAP MCS. The list they reviewed is listed below.

- Check your application status
- Use an eligibility screening/income benefit calculator
- Start, save, and submit your application
- Submit documentation about your case
- Communicate electronically with eligibility worker
- Schedule interview
- Report household change
- Report income change
- Receive notifications about any verifications needed
- Receive notifications about your certification or account changes
- Check a calendar of SNAP-related due dates/receive due date reminders
- Review information in a language other than English
- Check EBT balance
- Request and EBT card replacement
- Manage your EBT PIN
- Chat with customer service
- Review FAQs
- Locate community partners/resources
- Check office hours/locations
- Submit questions

Appendix C.3. New York City Case Study Memorandum

Modernizing Channels of Communication With SNAP Participants

New York
Case Study Report

insight
POLICY RESEARCH

Modernizing Channels of Communication With SNAP Participants New York City Case Study Report

FINAL

April 6, 2023

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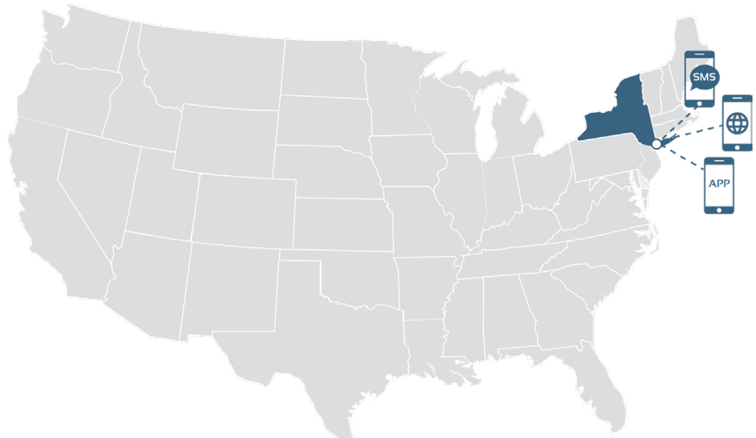


Mobile Communication Strategies in New York City

The primary purpose of the Modernizing Channels of Communication With SNAP Participants Study is to highlight best practices and lessons learned from various mobile communications strategies (MCS) implemented by the Supplemental Nutrition Assistance Program (SNAP) State agencies. For the purposes of this study, MCS include websites optimized for mobile devices, apps for mobile devices, and SMS/ text messaging. Through five case studies, the study sought to examine the experiences of five States related to the development, implementation, and maintenance of MCS. The case studies complement other elements of the study aimed to provide an overview of MCS activities in all States, gather client perspectives on MCS, and synthesize best practices.

To understand best practices and lessons learned from each State's MCS implementation, the study team interviewed key stakeholders, including SNAP State agency staff, community partners, local caseworkers, and third-party vendors, about their roles in the implementation process between August and October 2021. The study also captured SNAP participants' perspectives through two virtual focus groups with SNAP participants in each of the five States.

Within the State of New York, some benefit programs, including SNAP, are integrated and administered by one office at the city level. This memorandum highlights the findings from the New York City case study, including an overview of New York City's MCS, goals and target audiences for MCS, feedback from stakeholders, and a summary of perspectives from SNAP participants who use MCS. The findings were compiled using detailed analyses of interview and focus group data. These findings apply to the municipality of New York City and cannot be generalized to the rest of the State of New York.

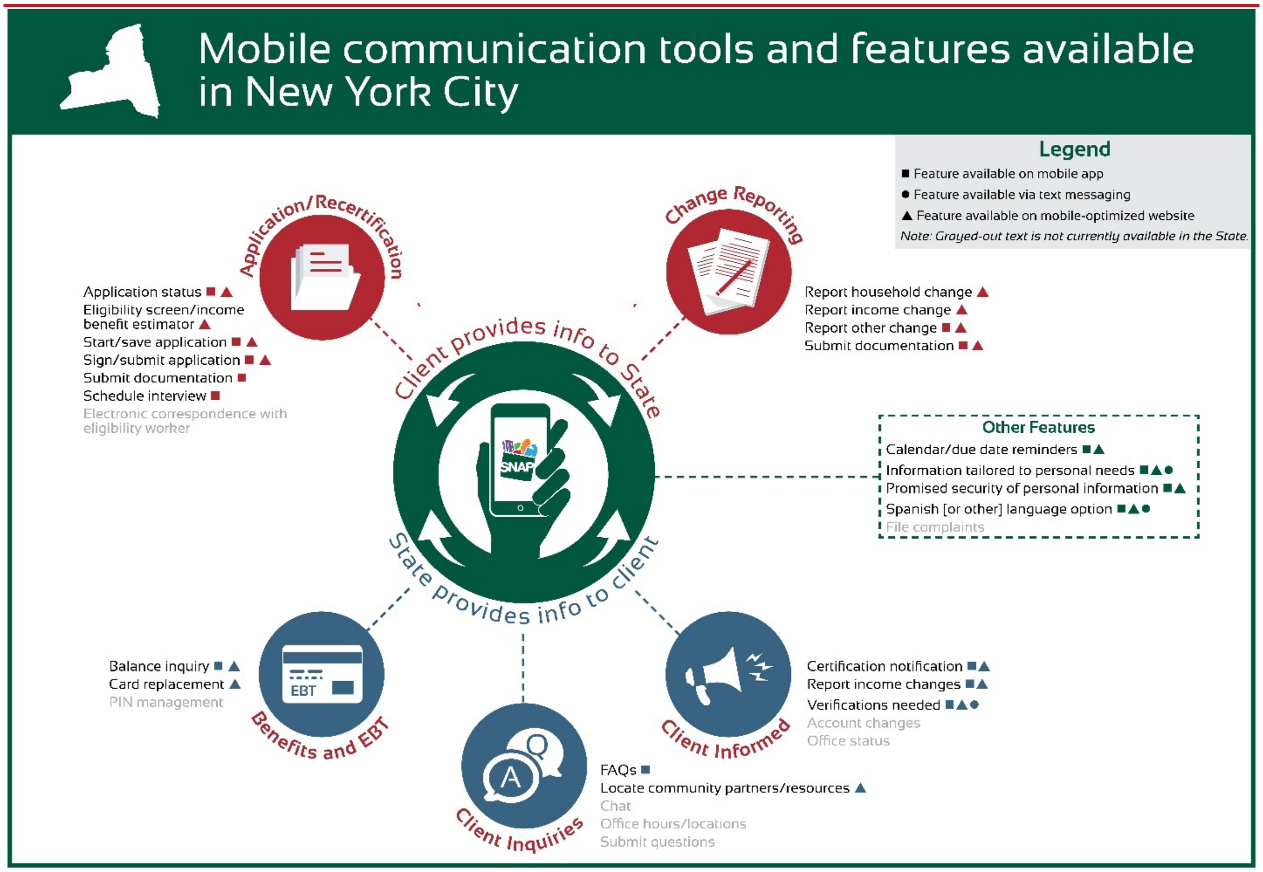
B. Overview of New York City's MCS

At the time of this case study (summer and fall 2021), New York City maintained a mobile-optimized website and a mobile app and also used text messaging for SNAP communication and SNAP-related activities. This section describes the function and purpose of MCS SNAP participants can access from their mobile devices in New York City.

1. MCS Available in New York City

Some components of New York City's SNAP MCS operate in tandem with other social safety net programs, such as Medicaid, Cash Assistance, Fair Fares (reduced price metro fares), and State Emergency Rental Assistance Program (ERAP). Although SNAP is independent from other social safety net programs, the goals, target audiences, and functional components of New York City's MCS for these programs often overlap. Figure 1 provides a full display of SNAP MCS functionality in New York City.

Figure 1. Mobile Communication Tools and Features Available in New York City



Mobile- Optimized Website

The Human Resources Administration (HRA), the New York City SNAP agency, maintains the New York City's mobile-optimized website and portal.

Functions available. Clients can use the mobile-optimized website to submit applications, track the status of their application, manage appointments, make changes to their income and household, and apply for other non-SNAP benefits. Most SNAP-related activities that cannot be completed via the mobile app can be completed on the mobile-optimized website, even when initiated via the mobile app.

Non-SNAP programs on mobile-optimized website. The website also provides access to other programs mentioned above (Medicaid, Cash Assistance, Fair Fares, ERAP). New York City anticipates adding Heating and Energy Assistance Program (HEAP) and child support access in the future.

Text/SMS Messaging

At the time of this study, SNAP users could opt into New York City's one-way text messaging service to receive alerts about their applications, accounts, recertifications, and other updates. In November 2021, this feature changed to opt out.

Functions and purpose. Text messaging helps staff communicate with clients to aid in the application and recertification process and keep clients informed about updates and necessary changes they may need to make to their accounts. Mobile devices are more accessible to the SNAP population than computers;[7] therefore, text messaging is an important strategy to keep clients engaged and aware of the status of their benefits.

Mobile Apps

New York City's ACCESS HRA mobile app is popular among users and city staff. The app shares some features with the mobile-optimized website, in addition to other functions. It has had a positive impact on the uptake, especially as a result of the app's ease of use and the effects of the pandemic.

Functions and purpose. Clients can use the mobile app to apply for SNAP benefits, check their application status, recertify, receive push notifications about recertification, and upload documents. Clients can also track their benefits on the app and check when their next payment will be. The app displays which documents and verifications are needed and how to upload them (e.g., directs users how far to hold the camera when uploading an image, indicates which document to upload next).

Non-SNAP programs on mobile app. Similar to the mobile-optimized website, clients have access to other social safety net programs on the ACCESS HRA app (excluding Medicaid). In addition to the programs available on the website, the ACCESS HRA app will soon include child support.

Use of third-party apps for SNAP. Clients can also use the Providers app (previously called Fresh EBT) for instant updates on electronic benefit transfer (EBT) balances across social safety net programs. This application is not maintained by the New York City SNAP agency but is popular among SNAP recipients.

C. History and Implementation of New York City's MCS

To understand the history of MCS in New York City, the study team asked key stakeholders for their impressions of the implementation, continuous improvement, and utility of New York City's MCS. This section details stakeholder perspectives about the impetus for MCS development and improvement, specific SNAP audiences New York City was targeting, marketing and outreach strategies, popularity and uptake of MCS, involvement of community partners, software infrastructure development, evaluation and monitoring of MCS for continuous improvement, and implementation challenges.

1. Goals for New York City's MCS

The primary goals for developing and improving New York City's MCS included an improved user experience for beneficiaries and a reduced number of in-person applications clients brought to local SNAP offices.

Improved client experience with and access to SNAP. The use of MCS for document submission, applications, and recertifications facilitates faster submission of cases by clients and faster processing of

[7] McCloskey, M. L., Thompson, D. A., Chamberlin, B., Clark, L., Johnson, S. L., & Bellows, L. (2018). Mobile device use among rural, low-income families and the feasibility of an app to encourage preschoolers' physical activity: Qualitative study. *JMIR Pediatrics and Parenting, 1*(1).

cases by caseworkers. Through the use of MCS, clients spend less time waiting in local SNAP offices, and caseworkers spend less time scanning and indexing documents.

> *I mean, at the end of the day, one of our overall goals—an objective of this entire initiative—was making it a better user experience, but also worker savings ... for the agency as a whole.*
>
> —New York City IT stakeholder

Reduced in-person traffic. The increase in the volume of applications sent electronically, which helped reduce staff workload.

2. Target Audience

> *One of the main goals, which it has achieved in a lot of ways, is to reduce the foot traffic into the location. They're handling a lot fewer paper applications, so that means that's manpower not dedicated to accepting the application and then scanning it into our system.*
>
> —New York City SNAP director

Although New York City's MCS for SNAP are intended for all SNAP and SNAP-eligible participants, the SNAP agency believed certain subpopulations would benefit the most: immigrants and non-English speakers, technologically savvy users, and low-income households with access to mobile devices.

Older beneficiaries. Stakeholders shared that their older population tended to avoid online methods of accessing their SNAP benefits, choosing instead to speak with staff (either in person or via phone) for assistance. Accessibility features that would benefit older beneficiaries were considered when designing MCS, such as the integration of the provider and client portals that allows specific community-based organizations to have direct access to client cases to help the clients with the online processing of applications and recertifications.

Immigrants. Stakeholders noted the difficulty of increasing uptake of MCS among immigrant populations. Various factors such as language barriers and concerns over sharing personal information (especially among those who may be undocumented) were listed as reasons for the slow adoption of MCS among this demographic. Therefore, MCS were crafted to accommodate six languages in addition to English and allowed account creation via community-based organizations (CBOs).

Technologically savvy beneficiaries. According to stakeholders, younger SNAP participants were more likely to use the website than other client groups, such as older beneficiaries. Younger users were also more receptive to these tools during the early days of the pandemic, and stakeholders shared that uptake among this demographic was high during this time.

Low-income earners with mobile devices. Low-income households with smartphones and data plans tend to have a high MCS uptake. One stakeholder noted that low-income earners were more easily able to access smartphones with data plans than computers. Therefore, they were more likely than other beneficiaries to use the mobile app and opt in to text messaging.

3. Marketing and Outreach Strategies

New York City's SNAP agency deployed various strategies to inform and encourage SNAP participants to seek out MCS available to them. These strategies included launching social media and public service announcement (PSA) campaigns, partnering with CBOs, sending email and paper notices, leveraging word of mouth, and relying on caseworkers.

Social media and PSAs. The New York City SNAP agency deployed an outreach campaign called "Skip the Trip," which involved announcements through social media, radio, billboards, and flyers distributed at community organizations. The campaign encouraged SNAP beneficiaries to use the ACCESS HRA mobile app and website to conduct their SNAP-related business. It was funded by the city council and specifically designated for SNAP-related marketing. In addition to CBOs, the agency distributed flyers at others venues in areas with high numbers of individuals with limited English proficiency, such as barbershops and bodegas. Marketing materials were disseminated in multiple languages. Appendix C.3.a provides an example of a "Skip the Trip" flyer.

Community partners. Community partners played a key role in promoting SNAP MCS to clients. They served as a channel through which clients could receive help accessing their benefits and learn how to use MCS. CBOs also helped clients with the application process, which was primarily accessed online during the early days of the COVID-19 pandemic. In addition to CBOs sharing these tools directly with SNAP clients, several partners shared the information widely among their networks of fellow community organizations serving SNAP clients.

Paper mail and email. Regular mailed or emailed correspondence SNAP participants received about their case included references to the ACCESS HRA mobile app and website and encouraged them to use these tools to manage their applications and benefits.

Word of mouth. SNAP participants learned about SNAP MCS from friends and family who also received SNAP benefits.

Caseworkers. Caseworkers told SNAP beneficiaries about SNAP activities that could be performed via the ACCESS HRA app and the website during their interactions. Caseworkers were informed and trained about MCS during monthly training meetings. During the training, caseworkers were asked to download the app to become familiar with what clients were seeing and learn how to help clients have a positive and meaningful user experience.

4. Popularity and Uptake of MCS

Several factors led to a high uptake of New York City's MCS, including ease of use, CBOs' encouragement of their clients to use MCS, discovery of MCS through applying for non-SNAP programs, and the effects of the pandemic.

Community-based organizations. CBOs' support of clients who were hesitant to use MCS led to increased uptake among clients in New York City. CBOs were able to aid in the account creation process for these populations and provide them with the skills to subsequently maintain their accounts independently.

> *There is some natural overlap among the recipients of a lot of these benefits, [and at] the same time this will be opening into some new user base that hasn't interacted with us before.*
>
> —New York City IT stakeholder

Uptake through using similar programs. Clients who used or searched for other public assistance programs (e.g., Fair Fares, Medicaid) often learned about their possible eligibility for programs such as SNAP while

> *In the beginning, I feel like it did not really take off so fast because there were still people who wanted to go to the centers to submit their documents ... Sometimes people ... don't really trust technology like that ... I believe that during a pandemic then, that's when everything online basically took off.*
>
> —Caseworker

searching the ACCESS HRA website. Stakeholders believed this contributed to the use and uptake of MCS substantially, particularly during the COVID-19 pandemic.

COVID-19 pandemic. The outbreak of COVID-19 and the subsequent economic effects led to an increase in the number of SNAP applications and a decrease in the number of brick-and-mortar offices where clients could go for assistance. Though certain client groups were hesitant to go online to sign up for benefits, the COVID-19 pandemic caused an increase in the uptake and use of the website and mobile app as in-person centers closed or became more difficult to access. One stakeholder mentioned that 98 percent of new SNAP applications were now submitted either through the app or the mobile-optimized website.

Ease of use. Stakeholders stated the uptake of the mobile app was high. They explained that most SNAP clients, regardless of income, had mobile devices they could use to access the mobile app or website and apply for SNAP benefits. This convenience, in concert with the app's ease of use, resulted in this higher uptake.

> *The good thing ... is that in our age right now, a lot of clients will have a smartphone. Whoever has a smartphone is basically pretty familiar with apps. So ... you tell people, 'You know what? Just go and download app.' ... People like the concept of the app.*
>
> —New York City community partner

Challenges with uptake. One primary challenge with MCS uptake was consistency of use. Clients typically only log in to the app and website when they have to update their account or recertify. However, consistency of use is crucial to keep clients informed about recertifications, notifications, general updates, and announcements about SNAP policy and ensure clients are aware of any action they must take to maintain benefits.

Uptake data. Of the roughly 4 million SNAP user logins per month, around 3 million are via the mobile app. The SNAP caseload in New York City is 1.6 million people, or roughly 900,000 cases.

5. Involvement of Community Partners and Other Stakeholders

When the New York City SNAP agency sought to improve the accessibility and ease of applying for SNAP benefits, it engaged community partners to contribute to the planning, development, and implementation of MCS.

Application and technical assistance. CBOs play a crucial role in increasing awareness and helping clients apply for and receive SNAP benefits. Several New York City CBOs provided technical support to help clients navigate the app and the website and inform clients of any important policy updates. One of the most important roles CBOs provided was to help clients submit documentation and complete their applications. CBOs provide in-person and phone support to clients who inquire about the submission and application process. If clients complete the necessary consent forms, CBOs can also create accounts and submit applications on their behalf granted the client's signature is on the application.

Continuous communication between community partners and SNAP agency. The relationship between local CBOs and the New York City SNAP agency is symbiotic and characterized by close cooperation and communication. Representatives from the SNAP agency use trainings and regular meetings to inform CBOs of important policy and technology updates to relay to beneficiaries. The hallmark of this close relationship is the mutually beneficial "open door policy" between CBOs and the SNAP agency. Designating specific CBOs to serve as liaisons between the SNAP agency and other community partners helps ensure the necessary stakeholders are considered in the decision-making process and information dissemination surrounding updates and maintenance of MCS.

> *We act like a pressure valve and connect ourselves to local community centers that are being swamped...[HRA] were very receptive. They did as much changing as they can, which made the CBOs and partners like us feel like they really listen to us; we have a voice.*
>
> —New York City community partner

Role in outreach and dissemination. A strong network of trusted CBOs is an extremely important resource when reaching a diverse clientele with different backgrounds, needs, and technical skill levels. CBOs often have the connections and networks that local government agencies lack when trying to reach these groups. Funding from New York State enabled the New York City SNAP agency to train CBOs who were able to reach beneficiaries to improve MCS uptake.

6. Software and Data Infrastructure

SNAP MCS for New York City evolved significantly in 5 years. Over time, New York City enlisted the expertise of third-party IT and software development vendors as MCS were improved and more features were added. Process and Technology Improvement Grant (PTIG) funding was critical to this effort.

> *If the person comes in and fills out a paper application, the caseworker can explain that kind of complex taxonomy of documents that they need to provide, and they can bring it into the center. Whereas when people were applying online, they were not having that explained to them, or they didn't have a digital channel to actually provide the agency with documentation ... So that was when the department started to think, 'could we take advantage of smartphones to allow clients to interact with us digitally in that kind of way' ... That led to our first mobile app project in 2015.*
>
> —New York City IT stakeholder

Limited functionality to start. At the start of MCS development and implementation (2014), the New York City SNAP agency worked with a third-party vendor to build the ACCESS HRA web portal, which was only fully accessible from a computer at first. In 2015 this portal allowed SNAP clients to submit their applications and recertifications online. At this time, the document submission process was difficult for SNAP clients because most did not have access to a fax machine or personal scanner, which was required to submit their supporting documents. These challenges prompted the agency to develop a mobile app that would enable clients to easily upload images of their documents directly from their mobile devices.

Later in 2015, the ACCESS HRA mobile app enabled document uploads and was accessible to clients and CBOs helping clients. This app was developed by a third-party vendor that built products specifically for human services agencies at the State and municipal levels.

Full-service native app. Two years later (2017), the ACCESS HRA app became a full-service app where clients could create an account and manage benefits. Updated features for the app were released in two phases throughout the year. In the first phase, clients could track appointments, benefit issuance, and case status and receive push notifications. In the second phase, clients could change their contact information, and additional push notifications were added.

> *We added a number of seamless integration points where clients would get a notification saying the recertification is due. [It] would include a button saying 'recertify now,' and when clients click that on the mobile app, we would take them over to the mobile-enabled website where clients can submit the recertification ... We wanted to make sure that the app and the portal are really a part of a suite of tools that we're providing to clients that go hand in hand.*
>
> —SNAP agency staff

Website optimization for mobile devices. In 2019, two years after the mobile app became full service, the ACCESS HRA website was optimized for mobile devices. During this process, the app and the website were integrated to allow clients to initiate certain tasks on the mobile app and be seamlessly routed directly to the website where the action could be completed.

Licensing of commercial products for more efficient development. Stakeholders explained that licensing commercial products that were customized for the SNAP agency's needs was an efficient strategy compared with building the tools in-house. It enabled the agency to make frequent software updates to accommodate the updates to the mobile device operating systems.

Text messaging and the application of behavioral messaging. Text messages and push notifications were implemented to decrease churn by helping reach clients who changed addresses frequently. Stakeholders explained that "robocalls" were no longer effective because most clients did not answer calls from unknown phone numbers. While SNAP agency staff found push notifications to be an ideal form of messaging because of the flexibility in character limits and content, text messages were necessary to reach clients who disabled push notifications on their mobile devices. The SNAP agency applied behavioral messaging to the content and the frequency of their texts and push notifications. Careful planning went into determining the frequency of texts to ensure clients understood their importance rather than assume it was spam. The content of each message was carefully crafted to communicate a clear message in as few characters as possible. Text messages and push notifications did not contain sensitive information but included links to direct clients to the exact location of the full message within their ACCESS HRA account on the app.

> *When the pandemic came, we went 100 percent to ACCESS HRA. Now people are really savvy after a year of applying. People now know how to recertify ... so with this pandemic came some education.*
>
> —Community partner

Streamlined process with full-service functionality. The account creation, account change, and application process have become streamlined via MCS. The COVID-19 pandemic caused a significant increase in MCS traffic, which decreased shortly after the first large wave of cases in New York City in 2020. However, at the time of this case study, rates had increased again close to early COVID-19 pandemic levels. Stakeholders expected this shift among clients toward using MCS to be permanent.

Back end improvements facilitating streamlined process. In addition to the increased efficiency of application processing on the client and caseworker sides, the back end technological improvements facilitated a streamlined process. Improvements to back end systems resulted in most submitted documents being automatically matched to the right case, enabling caseworkers to review and process them quickly. One stakeholder explained that with the systems in place before SNAP MCS and before the recent economic downturn, the case management system would not have been capable of manually handling the influx of applications and documents that were submitted. The stakeholder explained that document and account matching was a key component of success of MCS improvement efforts.

> *By utilizing a client's personal information that they provide through the app, staff can more easily match cases within their case management system. This also adds an extra layer of data security.*
>
> —New York City IT stakeholder

Aspirations for future MCS capabilities. Stakeholders felt several features would add value to the SNAP agency and improve the client experience:

- **Access to Medicaid** account within the ACCESS HRA mobile app and website
- Ability to **manage EBT account** on the ACCESS HRA app
- **Multifactor authentication** for added security, especially as more personal data are incorporated into the functions available within the app (e.g., child support data)

7. Evaluation and Monitoring of MCS

The New York City SNAP agency regularly engages with community partners to gauge the successes and limitations of New York City's MCS; the agency also processes direct client feedback from the call center and app store and assesses input from a one-question website survey on their satisfaction with the experience. Based on these client experience monitoring activities, stakeholders believed clients were satisfied with the app and the website, which made clients' lives easier.

> *We would go and actually watch our clients use our website and mobile apps to understand what some of the pain points are. Some of the improvements—maybe something wasn't as user-friendly as we thought it would be—so ... we would then log that in our backlog and prioritize it for an upcoming release.*
>
> —SNAP agency staff

Regular engagement of community partners. As discussed in section C5, the SNAP agency facilitates regularly scheduled meetings with partner CBOs to obtain feedback on SNAP operations on the ground. These meetings include updates about the program from the SNAP agency to CBOs and insights from CBOs about possible improvements to better meet the needs of SNAP clients.

Direct client feedback. The SNAP agency also receives direct user feedback from the app store ratings and comments, a one-question survey on the ACCESS HRA website, and feedback collected from the call center that is escalated to technical teams.

8. Implementation Challenges

As expected with most new initiatives, there were challenges associated with the development and implementation of new MCS.

> *[One agency] reports to one place, [another agency] reports to another place, I report to this other place, and everyone's hedging, so you can imagine then how long [it takes], and that's just to come up with what we should do. Then you have to get involved with another group, who's on the procurement side, to actually do that right thing ... The way we're structured organizationally is not conducive to making decisions, iteratively trying things, and pivoting.*
>
> —New York City SNAP director

Institutional and bureaucratic barriers. Stakeholders noted that the inherently bureaucratic structure of State and local government created a barrier to the efficiency of the MCS implementation process. Some elements of the MCS development crossed multiple agencies with siloed priorities, which stakeholders felt may have slowed development and implementation.

The ACCESS HRA mobile app was the first of its kind in New York City, which led to institutional challenges to ensure the app met the security requirements of several entities (i.e., New York City, New York State, Federal regulations). The New York City SNAP director offered that one possible solution to this challenge would be to outsource much of the development to do less coding in-house, which he viewed as one activity that slowed the implementation process.

Document upload feature. When the document upload feature was first deployed, it presented several challenges because few examples from other municipalities were available to learn from at the time. This technology was new nationwide and especially to the New York City IT ecosystem. The IT team at the SNAP agency collaborated closely with the citywide IT agency to ensure the application worked on the client side, the back end systems were secure, and each document was scanned for viruses as it entered the system. Along with virus scanning, the agency experienced challenges mapping the documents uploaded through the mobile app to an individual's case on the back end system.

> *We didn't have smart tools that could read the documents that could say, 'this is Glen's birth certificate.' We were dependent on the information sent by the client to find matching demographics within our system to identify these documents belong to this case. I think that was majority of the 5 months of our challenge of implementing the system.*
>
> —New York City IT staff/vendor

Resistance to technology. Stakeholders learned certain segments of the population were resistant to technology and overwhelmed by the application process. This created a challenge for the SNAP agency when trying to make MCS usable for everyone. To address this issue, the SNAP agency gave partner CBOs the capacity to conduct SNAP business on behalf of clients online. This assistance was particularly helpful for clients who had difficulty visiting a SNAP office in person.

Adjustment to an increase in document indexing. As more clients adopted MCS as their primary means of conducting SNAP business, the back end systems did not adapt quickly enough, resulting in a backlog of document processing and indexing on the back-end. The SNAP agency IT team made back end improvements that solved this issue. The agency emphasized the importance of creating a feedback loop to inform the clients of these issues to prevent them from submitting documents several times, thereby worsening the backlog, but also to ensure they did not lose trust in the system.

D. Perceived Benefits and Limitations of MCS Features

Stakeholders shared their perspectives on New York City's MCS and described how MCS implementation affected State and local operations. Stakeholders also shared the resources they believed would help streamline SNAP business via these MCS tools.

1. Perceived Benefits

Overall, stakeholders found SNAP MCS to be a meaningful avenue for engaging community partners and streamlining the application submission process. The integration of multiple programs within one app and website has streamlined the process for clients.

Engagement of community partners. Community partners found MCS extremely important and valuable and felt the SNAP agency should always engage community partners when implementing MCS and making improvements. MCS updates and improvements create a meaningful opportunity for community partners to maintain communication and collaboration with the SNAP agency.

Streamlined application submission process. Between the functionality on the mobile app and the mobile-optimized website, clients can complete the entire application process online from a mobile device. As a result, clients can complete the application and recertification process more quickly. It also creates the potential to reduce churn because clients receive more reminders across multiple media.

> *I just know once the tools were implemented ... once clients were comfortable using it, that it was going to change the whole way we receive and get documents and that it would help us instead of having a client submit via mail, waiting, and the case is held up because we're waiting for documents to come in ... Now it's just great that it's there most of the time.*
>
> —Caseworker

Integration of multiple programs facilitating streamlined process for clients. Allowing clients to access multiple programs via one channel streamlines their experience. This includes applications, recertifications, and updates to their account. Integration of these programs into one app and website was driven by the recognition that clients were uploading SNAP documents into a city run app used for discounted subway and bus fares and vice versa. Integrating these apps streamlined the process and prevented those types of errors.

2. Perceived Limitations

While stakeholders overall approved of the utility of New York City's MCS, some limitations persisted. Though the development and uptake of MCS had generally been considered successful, stakeholders also recognized some limitations.

Difficulty integrating EBT information into the app. Clients are not typically inclined to use the app on a regular basis unless checking their EBT balance. However, depending on the vendors' systems, there is often a delay between when the EBT card is used and when the balance is updated on the ACCESS HRA website, leading many clients to rely on the third-party Providers app for a current EBT balance. The SNAP agency would like to improve this aspect of the app because it would facilitate more opportunities to get the attention of SNAP clients when they have a notice waiting in their account on the app or website.

> *It's a very volatile data point, but it's a very valuable one. And it's also an opportunity for us to draw people into the app. People may log in to the ACCESS HRA app to check their EBT balance and realize that they need to recertify their case, or they're going to lose their benefits ... We have encountered resistance from the EBT vendors to providing [the access] that would allow us to retrieve that.*
>
> —New York City IT stakeholder

Discomfort with technology among SNAP population. As discussed in section C2, stakeholders understood a subset of the SNAP population would always be uncomfortable with technology. This population includes older generations with less experience with certain technology and undocumented immigrants and clients who speak other languages. To address this issue, stakeholders felt it was important to maintain nondigital avenues available for these groups to continue to access benefits.

Character limits in text messages. Although the mobile app and the mobile-optimized website have many uses, text messaging is also an important element to help reduce churn and improve the client experience. However, some limitations with text messaging hinder its full potential. Stakeholders explained that character limits and multitext message threads prevented the transmittal of clear and meaningful information to clients. They shared that because app push notifications were more flexible and could contain more personalized information, they were considered the best way to notify users. However, the utility of push notifications depends on whether they are enabled on clients' mobile devices, which is often not the case.

3. Effects of MCS on SNAP Operations

From continuously identifying areas for improvement to restructuring the processing of applications and recertifications, the implementation of New York City's MCS affected the way SNAP agency staff and caseworkers conducted SNAP-related work.

More efficient caseworker workflow. Stakeholders shared the wide uptake of MCS led caseworkers to handle substantially fewer paper applications and experience decreased foot traffic in local SNAP offices. This shift required fewer staff dedicated to accepting and scanning documents into the system, making the process more efficient overall.

Less time spent resolving cases of churn. Caseworkers noticed spending less time repeatedly requesting documents and taking steps to prevent churn.

Less time spent handling client calls. In addition to streamlining the document submission process, MCS also helped clients gain access to the status of their cases, which resulted in fewer calls to caseworkers and fewer visits to local offices to obtain those updates.

4. Additional Resources Desired

At the conclusion of all interviews, stakeholders were asked what additional resources would improve the usefulness of New York City's MCS for SNAP. Stakeholder suggestions follow.

Additional CBO and caseworker training on new technology. Community partners and caseworkers are often the first line of aid to clients struggling with SNAP MCS. Providing CBOs and caseworkers with resources, including funding, time, and formal training on new technology and tools, would enable them to help clients more effectively.

Better integration of funding, development, and implementation across Federal programs. Stakeholders felt it would be beneficial to blend Federal funding across systems to streamline the development and implementation of MCS tools. The funding would be more efficiently used, and lessons learned would be less siloed and shared more effectively across programs. They explained that different funding streams had varying restrictions, complicating the development and implementation process.

> *One critical thing that I think has impacted us and our ability to make smart moves is because FNS funds are a portion of our resources, and Health and Human Services funds TANF [Temporary Assistance for Needy Families] and HEAP, there are these different funding streams ... There seems to be a lot of instances where things have to be done in a disjointed fashion, when the underlying tool would serve multiple programs. So, there could be some way to blend funding streams on products.*
>
> —SNAP director

Formal dissemination of lessons learned across Process and Technology Improvement Grants (PTIG) grantees. Many States have used PTIG grants to develop and improve MCS for SNAP, yet there has been no formal mechanism for those grantees to share lessons learned with other agencies hoping to launch their own MCS or make improvements to current ones, helping them avoid similar missteps.

E. Feedback From SNAP Participant Focus Groups

The study team conducted 2 focus groups with a total of 14 SNAP beneficiaries who had experience with New York City's MCS to understand their needs and experiences.

1. Participant Use and Awareness of MCS in Their State

All focus group participants had experience using at least one type of SNAP MCS available to New York City SNAP beneficiaries. Participants felt more comfortable using their mobile devices because they were able to avoid in-person contact during the COVID-19 pandemic. They also saved time by not physically traveling to their local SNAP office and saved money on postage by submitting their forms electronically. As one participant shared, "It surely beats having to be in line with 1,000 people." Participants also agreed that the ability to conduct SNAP-related business on their mobile devices was beneficial when they did not have reliable broadband internet, stating that they could rely on their cell data if necessary.

Participants explained some SNAP clients might not want to conduct SNAP business from a mobile device if they were concerned about data privacy and security, had poor internet access, had limited space for apps on their mobile devices, had a screen too small for their level of dexterity and vision, or were generally uncomfortable with technology.

Participants learned about New York City's SNAP MCS from various sources, such as friends, paper mail from the SNAP office, email from the SNAP office, and another type of MCS (e.g., learning about the app through the website).

2. Participant Feedback on SNAP MCS

Participants were asked for feedback about the various features they experienced from SNAP MCS, including text messages, the ACCESS HRA app, and the ACCESS HRA mobile-optimized website. Some participants had never used MCS before the pandemic and were pleased with the ease of conducting business this way.

Text/SMS Messaging

Eight of the 14 participants had received SNAP-related text messages sent by the New York City SNAP agency, 4 had never received them (2 of whom were unaware text messaging was available), and 2 were not sure if they had received them. Overall, participants appreciated having the text option, stating it reassured them they would be reached even if they missed a notice in the mail or email. One participant explained that they disabled push notifications on their phone, so they valued getting text messages.

> *Your phone is always in your hand, like 90 percent of the time probably ... It's just easier for the information to come right to you without you having to remember which date something important is due ... Nine times out of 10, your phone will be in your hand when that message comes, or you're going to see it in the next 3 to 5 minutes.*
>
> —SNAP participant

Timing of text messages. Participants expressed mixed opinions about the timing of the texts. Most participants preferred substantial lead time before recertification, suggesting a reminder of 30 days prior to their due date and then another reminder 1 to 2 weeks before. A few participants felt they would forget about their recertification if the reminder only came 30 days prior.

> *I appreciate that they give me so much time. I have a friend who missed her certification ... but she didn't have the text option that we do, and I think now she has to start all over.*
>
> —SNAP Participant

Some participants experienced delayed text messages that included customized but outdated information related to their case. It was unclear whether this experience was during an unexpectedly high volume surge in case processing that might have created a delay on the back end systems.

Content of text messages. Participants found the most value in the recertification reminders. Participants explained that the text messages were applicable to their case but did not contain personal information. They did not think the texts needed to be personalized because they understood these messages were meant to be informational and prompt action on their case.

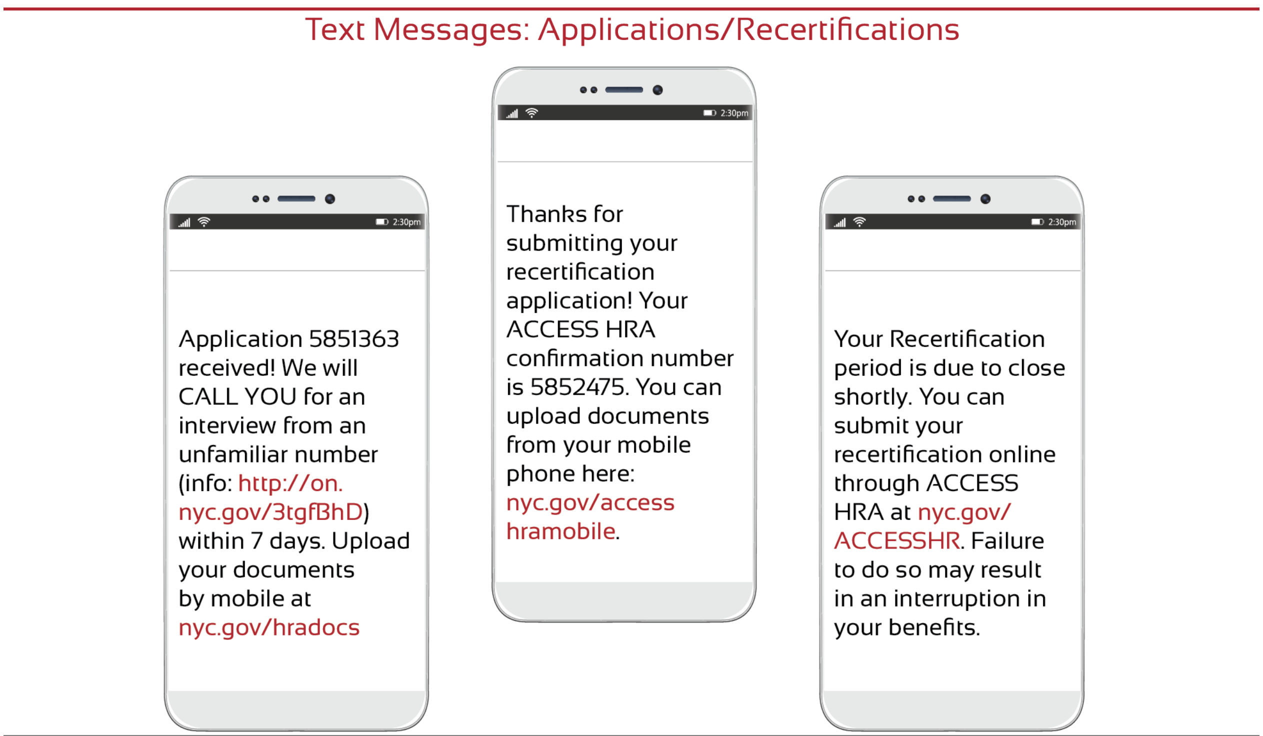
> *The problem with the text messages is they're not always timely ... I've actually had text messages for appointments that came after the appointment. That creates a problem because if, for some reason, you're relying on the text messages, you're missing your appointments because the texts are coming afterwards.*
>
> —SNAP participant

Participants were provided an opportunity to share their feedback about specific sample texts they might have received from the New York City SNAP agency. Appendix C.3.b provides all sample texts displayed in the focus group. After their review of the sample text messages, participants felt the messages were direct, clear, and informative overall.

Participants discussed two specific issues. One text (see figure 2) used a bit.ly style link (http://on.nyc.gov/3tgfBhD), and another used a full URL (nyc.gov/ACCESSHRA). One participant explained that consistency was important to them, and this difference might make them suspicious about the legitimacy of the source of the text message. Participants also noticed the text messages that stated, "Thanks for submitting your recertification application" and "Application 5851363 received" had the potential to be misleading because they thought it sent the message that the application was complete, when they actually still needed to upload their documents. Participants suggested rephrasing the text to say, "Thank you for starting your application."

> *It's there as a tool to help us fulfill our end of the obligation.*
>
> —SNAP Participant

Figure 2. Sample Text Messages About Applications and Recertifications

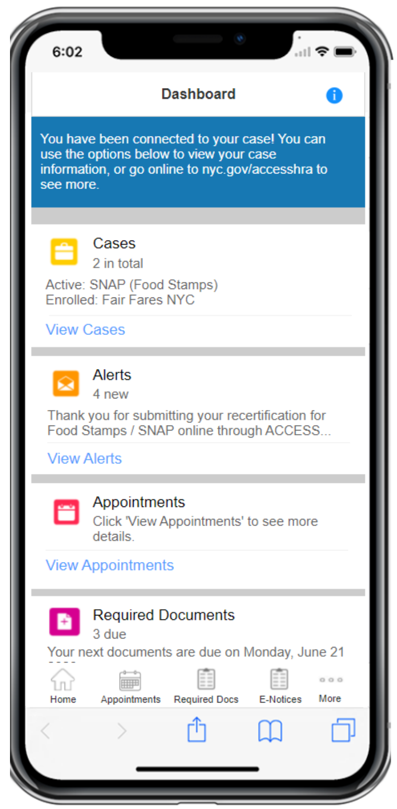


Mobile Apps

All participants provided feedback about their experiences with the ACCESS HRA mobile app. SNAP-related activities participants conducted on the app included uploading documents, completing application and recertification forms, and checking the status of their applications and recertifications.

Appearance and ease of use. Overall, participants liked the appearance of the app, sharing, "I like the look of it—the colorfulness is very clean and nice. That's lacking on the website." Figure 3 displays an example of the app dashboard.

Figure 3. Sample Dashboard of ACCESS HRA Mobile App



Participants reported they appreciated the ease of conducting their SNAP business through the app, especially those with transportation and childcare challenges. Participants also believed the app was popular, noting their friends and family who received SNAP all used the ACCESS HRA app.

Participants also appreciated that when a service was not available directly through the native app, they could initiate the task on the app, which then routed them directly to the relevant part of the ACCESS HRA mobile-optimized website to complete the task.

One participant, who was vision impaired, explained the font size on the app was too small for her, so she preferred to use the website from her phone because she could zoom in. She suggested increasing the font size to 14 points.

Several participants agreed that a live chat feature via the app would be useful.

Document upload. Overall, participants felt the process for uploading documents via the ACCESS HRA app was straightforward. Several participants noticed an improvement to the document upload experience after the COVID-19 pandemic began. Prior to the pandemic, some participants struggled with the document upload feature, sharing that the process of assigning the document type was not simple, and they found themselves needing to upload documents several times before the upload was successful.

> *I felt like it was much easier to go through the app than to go through ACCESS HRA website directly. Because once you log in, it automatically puts you where you needed to go.*
>
> —SNAP Participant

Some participants were frustrated that the only files accepted in the document upload process were images and not PDFs. They explained that this required extra steps to take a screenshot of a PDF from their phone to successfully upload the document as an image.

EBT balance. One area of frustration for several participants was checking their EBT balance through the ACCESS HRA app. The lag between the time the EBT card was used in a store and the time the website displayed the updated balance was longer than they preferred, discouraging participants from using the app to check their balance. Instead, they turned to the Providers app, which they cited as updating more frequently than the ACCESS HRA app.

Timeliness of completing SNAP tasks. Participants shared they were able to complete all of their SNAP business more quickly by using the app and the website. One participant shared, "It beats going to the office for sure in every possible way, so that's the only thing … With tech and everything, they finally sped up the times in which you can handle your cases—it's perfect."

Mobile- Optimized Website

All 14 participants had accessed the ACCESS HRA mobile-optimized website from their mobile devices. SNAP-related activities participants conducted on the ACCESS HRA website were completing forms on their applications and recertifications, checking their application and recertification status, and searching for answers to questions about SNAP.

Some participants preferred the website over the app because of the ability to easily zoom in on small text. They also appreciated the ability to easily complete tasks that were not available on the ACCESS HRA app. However, several participants found it easier to initiate a task on the app and be routed to the website than to initiate a task on the website.

> *Life is so much easier when you can just do things on the go … It's just so much more convenient to just be able to be on the go and still get stuff done. And even accessing the website is still easier when you can just do everything mobile.*
>
> —SNAP participant

Website access on a mobile device. Many participants found the use of the app and the website from their mobile devices interchangeable in terms of accessing what they needed and ease of use.

Several participants preferred to use a computer to access the website if they needed to type a lot of text, such as filling out forms.

3. Features of Most Interest to SNAP Participants

Participants were given a list of MCS features and asked to indicate which features they were the most interested in having in their MCS for SNAP-related activities (appendix C.3.c). The activities of most interest were checking application status, requesting an EBT card replacement, chatting with customer service through the app, checking EBT balance, and submitting documentation about the case. In addition to the features provided on the list, participants also expressed an interest in conducting their interviews virtually through videocalls rather than in person.

Impact of COVID-19 Pandemic on MCS

The COVID-19 pandemic demonstrated the value of having MCS available to SNAP participants and generated more demand for these tools.

- The closure of local SNAP offices created a need for a mechanism to continue managing SNAP benefits electronically; the functionality of the mobile-optimized website and mobile app helped minimize barriers to accessing SNAP benefits.
- Popularity and uptake of SNAP MCS increased when the COVID-19 pandemic began. Stakeholders shared that several clients who were initially hesitant to use MCS for SNAP-related business because of data security concerns started to submit their information via MCS because it was faster than mailing the documents to the office.

F. Lessons Learned From MCS Implementation

The findings described in this case study report provided an overview of the successes and challenges New York City experienced while implementing SNAP MCS. From these findings, table 1 presents lessons learned for successful MCS implementation.

Table 1. Lessons Learned From MCS Implementation in New York City

Partnerships and Engagement	
Maintain consistent communication between State agency and partners. Community partners offer expertise and access to SNAP participants and SNAP-eligible individuals. These partners have a unique understanding of the needs of SNAP participants and can offer invaluable feedback on MCS design and outreach. Forming a SNAP workgroup that includes input from community and IT partners is also important to ensure necessary considerations are regularly disseminated to those who are building and upgrading MCS tools.	**Designate CBOs as primary liaisons with SNAP agency.** In regions where several CBOs work with the SNAP population, it is helpful to designate a few to have direct and regular communication with the SNAP agency. These CBOs are then tasked with disseminating information to other partner CBOs within the region and the SNAP agency.
Facilitate uptake of MCS through CBO outreach. CBOs were key contributors to the promotion and uptake of MCS among clients in New York City. Engaging CBOs in outreach about the availability and utility of MCS facilitates client uptake of these tools. This relationship is key to engaging clients who struggle with technology or do not have the credentials to create an account themselves (e.g., undocumented immigrant population without social security numbers).	**Facilitate a positive user experience by showing clients how to use MCS.** Caseworkers and CBOs have direct interaction with SNAP clients. This interaction enables them to inform clients about the availability of MCS and can serve as an opportunity to demonstrate how to use MCS to facilitate uptake. Allotting the time and space for caseworkers to do this—and the funding for CBOs to do this—can result in a more positive user experience and a more efficient application and recertification process for the client and the caseworker.

Technical Considerations		
Apply behavioral messaging ("nudge theory") to text messages and push notifications. It is important to be intentional about the length, content, and frequency of text messages and push notifications. If messages are sent too frequently, they can be considered spam, making each message less effective.	**Implement push notifications in addition to text messaging.** When possible, MCS should include push notifications in addition to text messaging. Push notifications have more flexibility in the length and format of the messages. However, it is still important to have text messaging because many users disable push notifications on their mobile devices.	**Implement opt-out text messaging rather than opt in.** Implementing text messaging as opt out rather than opt in enables the SNAP agency to reach more individuals who initially feel indifferent to the receipt of text messages and later find them helpful.[8]

[8] For electronic notices specifically, States must receive the household's consent before providing. See FNS's Electronic Notice Waivers and Options memo for more information on electronic notice requirements.

Technical Considerations (continued)

Use native apps to improve ease of use. Optimizing websites for mobile devices is important to ensure clients without computers can fully access their SNAP benefit accounts. However, native apps improve ease of use because they are designed specifically for mobile device usability.

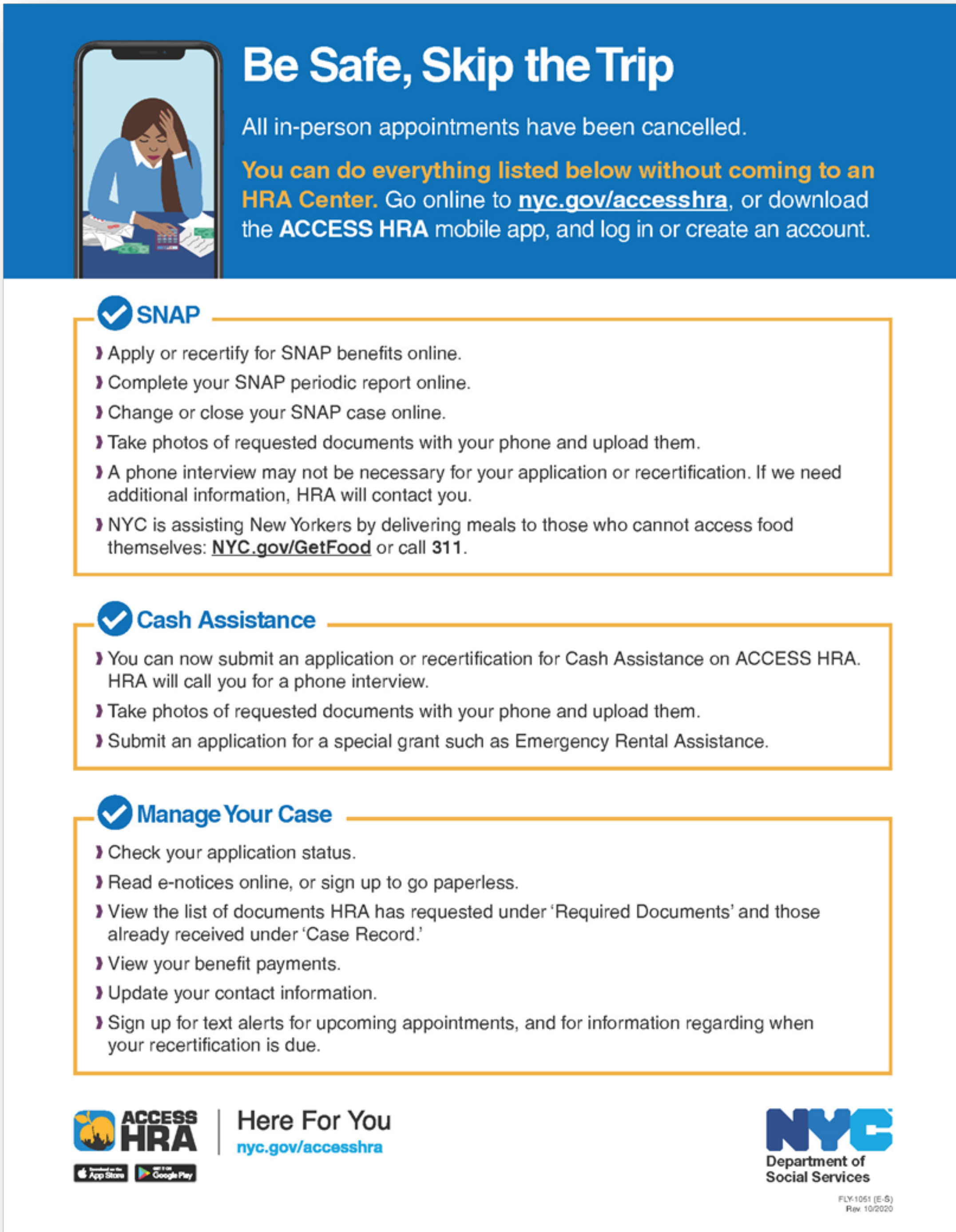
Build direct routing from app to website. When certain actions or information is not fully included in the native app, New York City built a prompt within the app to route the user directly to the location on the mobile-optimized website that contains the action the user was trying to take.

License commercial products for more efficient development. Licensing commercial products that are customized for the SNAP agency's needs is more efficient than building the tools in-house. This is especially helpful when the SNAP agency must make changes to accommodate updates to the operating systems of mobile devices.

Appendix C.3.a. Sample "Skip the Trip" Flyer

Flyers for the "Skip the Trip" campaign were disseminated in multiple languages. Figure A 1 displays an example of the flyer in English.

Figure A1. Sample "Skip the Trip" Flyer



Be Safe, Skip the Trip

All in-person appointments have been cancelled.

You can do everything listed below without coming to an HRA Center. Go online to **nyc.gov/accesshra**, or download the **ACCESS HRA** mobile app, and log in or create an account.

SNAP

- Apply or recertify for SNAP benefits online.
- Complete your SNAP periodic report online.
- Change or close your SNAP case online.
- Take photos of requested documents with your phone and upload them.
- A phone interview may not be necessary for your application or recertification. If we need additional information, HRA will contact you.
- NYC is assisting New Yorkers by delivering meals to those who cannot access food themselves: **NYC.gov/GetFood** or call **311**.

Cash Assistance

- You can now submit an application or recertification for Cash Assistance on ACCESS HRA. HRA will call you for a phone interview.
- Take photos of requested documents with your phone and upload them.
- Submit an application for a special grant such as Emergency Rental Assistance.

Manage Your Case

- Check your application status.
- Read e-notices online, or sign up to go paperless.
- View the list of documents HRA has requested under 'Required Documents' and those already received under 'Case Record.'
- View your benefit payments.
- Update your contact information.
- Sign up for text alerts for upcoming appointments, and for information regarding when your recertification is due.

ACCESS HRA

Here For You
nyc.gov/accesshra

NYC
Department of Social Services

FLY-1051 (E-S)
Rev. 10/2020

Appendix C.3.b. Sample Text Messages Shown to Focus Group Participants

Focus group participants were shown two slides with sample text messages. Figure B1 shows text messages related to applications and recertifications. Figure B2 contains text messages related to case changes and notices.

Figure B1. Sample Text Messages Relevant to Applications and Recertifications

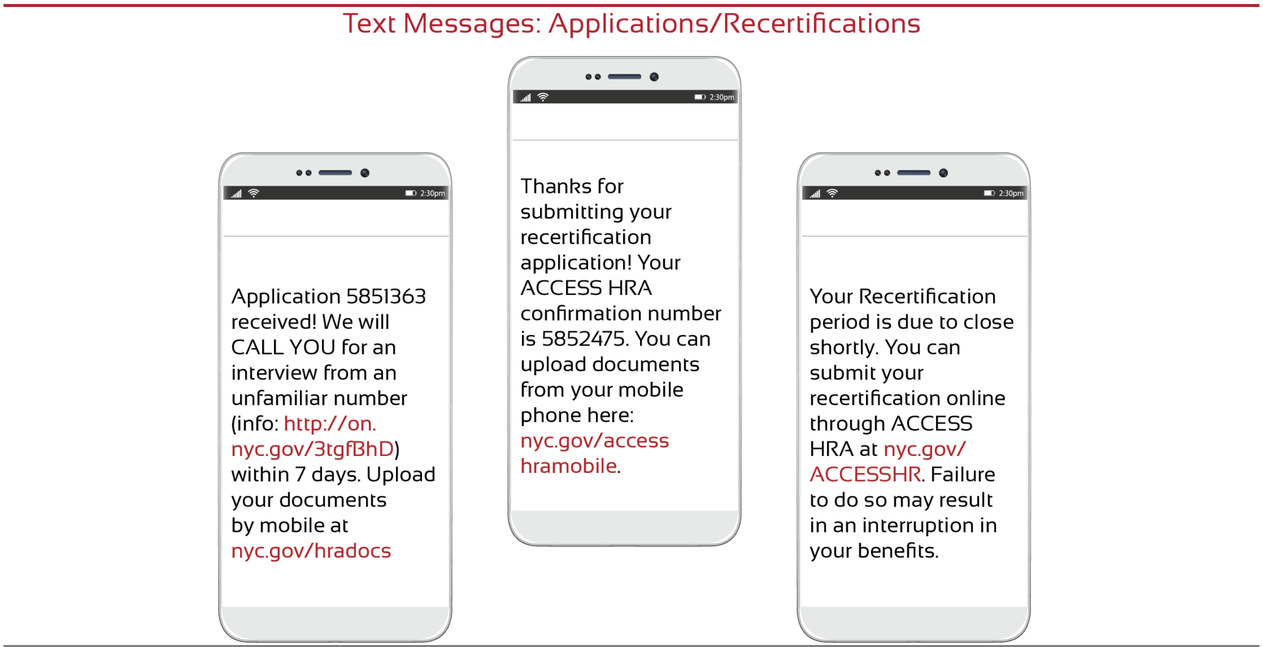
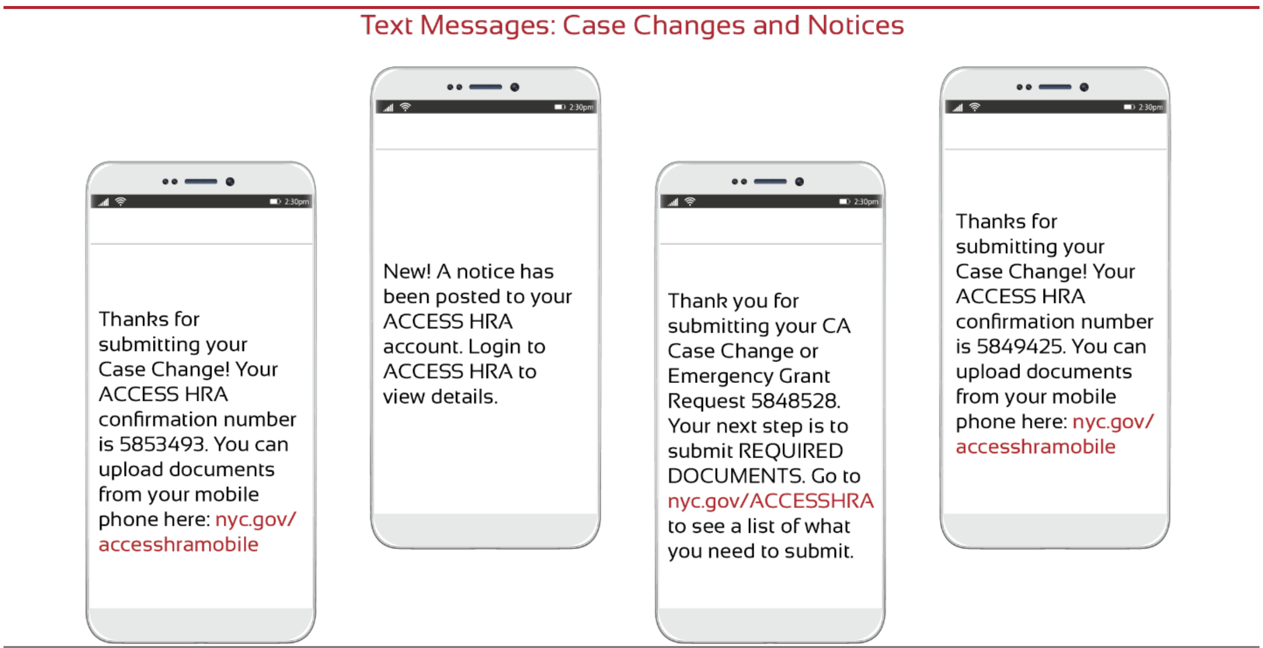


Figure B2. Sample Text Messages Relevant to Case Changes and Notices



Appendix C.3.c. List of Mobile Communication Strategies Features Offered to Focus Group Participants

At the end of each focus group, participants were asked to review the following list of potential features offered through mobile communication strategies (MCS). They were then asked to indicate the top features they were most interested in for their SNAP MCS.

- Check your application status
- Use an eligibility screening/income benefit calculator
- Start, save, and submit your application
- Submit documentation about your case
- Communicate electronically with eligibility worker
- Schedule interview
- Report household change
- Report income change
- Receive notifications about any verifications needed
- Receive notifications about your certification or account changes
- Check a calendar of SNAP-related due dates/receive due date reminders
- Review information in a language other than English
- Check EBT [electronic benefit transfer] balance
- Request and EBT card replacement
- Manage your EBT PIN [personal identification number]
- Chat with customer service
- Review FAQs [frequently asked questions]
- Locate community partners/resources
- Check office hours/locations
- Submit questions

Appendix C.4. Texas Case Study Memorandum

Modernizing Channels of Communication With SNAP Participants

insight
POLICY RESEARCH

Modernizing Channels of Communication With SNAP Participants Texas Case Study Report

April 6, 2023

Authors

Rachel Gaddes, Nina Page, Chrissy Steigelman

Submitted to

U.S. Department of Agriculture
Food and Nutrition Service
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Alexandria, VA 22314

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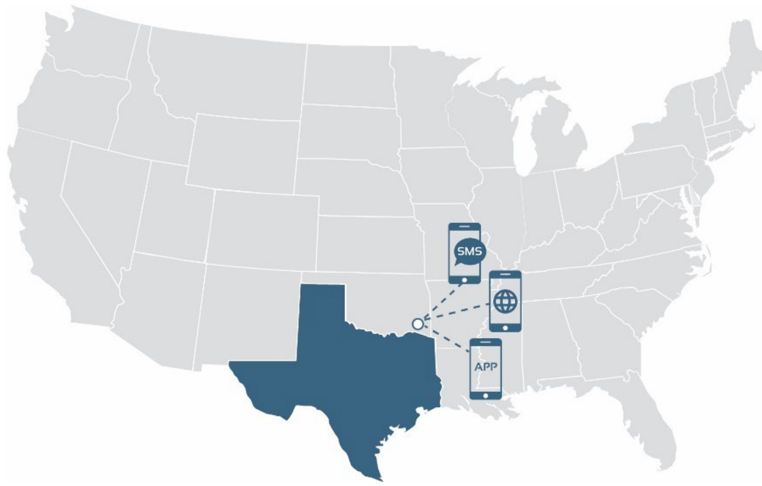


The primary purpose of the Modernizing Channels of Communication With SNAP Participants Study is to highlight best practices and lessons learned from various mobile communication strategies (MCS) implemented by Supplemental Nutrition Assistance Program (SNAP) State agencies. For the purposes of this study, MCS include websites optimized for mobile devices, apps for mobile devices, and SMS/text messaging. Through five case studies, the study sought to examine the experiences of five States related to the development, implementation, and maintenance of MCS. The case studies complement other elements of the study to provide an overview of MCS activities in all States, gather client perspectives on MCS, and synthesize best practices.

To understand best practices and lessons learned from each State's MCS implementation, the study team interviewed stakeholders, including SNAP State agency staff, community partners, local caseworkers, and third-party vendors, about their roles in the implementation process between July and December 2021. The team also captured SNAP participants' perspectives through two virtual focus groups in each of the five States.

This memorandum highlights findings from the Texas case study, including an overview of the State's MCS, goals and target audience of MCS, feedback from 10 stakeholders, and a summary of perspectives from SNAP participants who use MCS. These findings were compiled using detailed analyses of interview and focus group data.

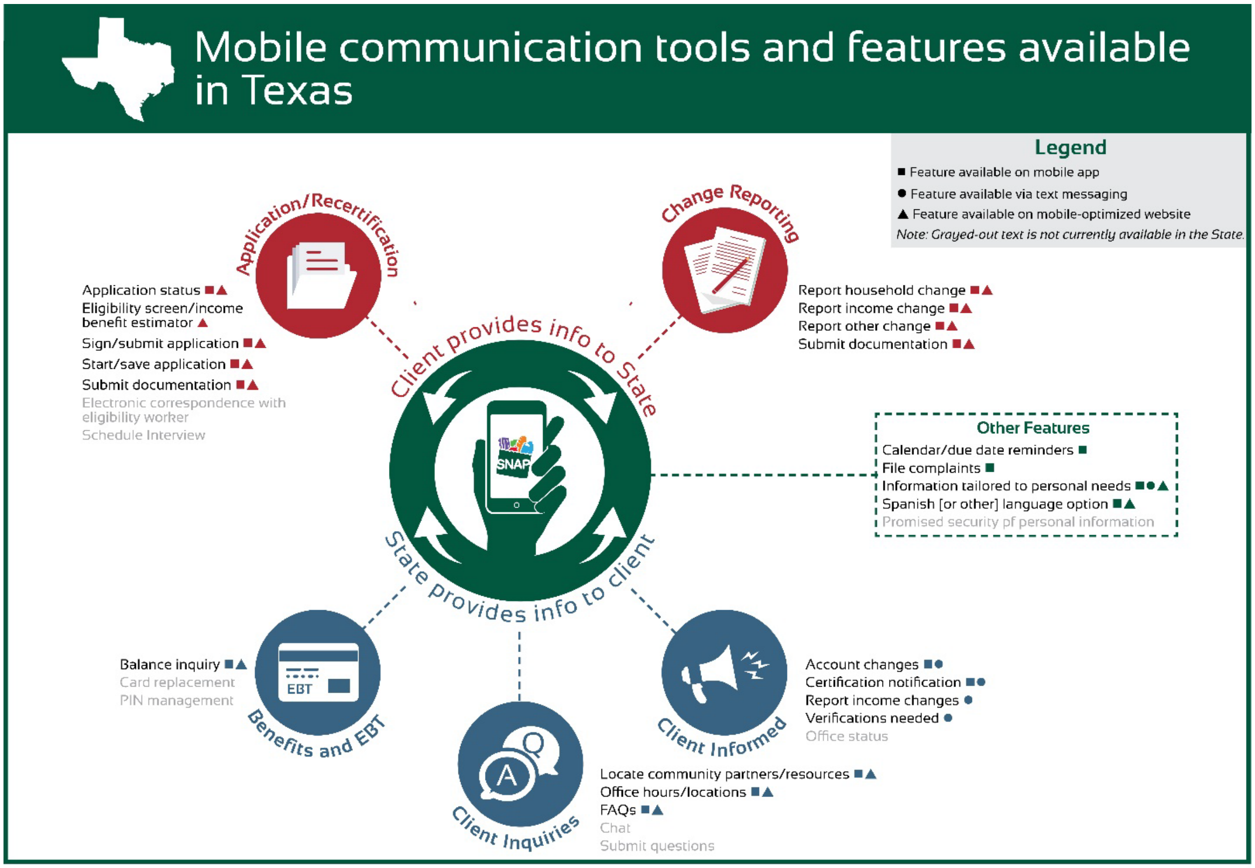
B. Overview of Texas's Mobile Communications Strategies

At the time of this case study (summer through winter 2021), the State of Texas maintained a website optimized for mobile devices, a text messaging notification system, and a mobile app for SNAP communication and SNAP-related activities. This section describes the functions and purpose of each MCS that SNAP participants can access from their mobile devices.

1. MCS Available in Texas

Although SNAP is independent from other social safety net programs, the goals, target audiences, and functional components of Texas's MCS often overlap with those of other social safety net programs, including the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC); Temporary Assistance for Needy Families (TANF); Children's Health Insurance Program (CHIP); Medicare; and Medicaid. Figure 1 provides a full display of MCS functionality.

Figure 1. Mobile Communication Tools and Features Available in Texas



Mobile- Optimized Website

The Texas Health and Human Services Commission is the State SNAP agency and maintains a website portal called “Your Texas Benefits” through which beneficiaries can access SNAP in addition to other social safety net programs (see figure 2).

Functions and purpose. YourTexasBenefits.com offers a variety of functions to help participants manage their SNAP benefits remotely. Some of the most used features on the website include balance inquiries, recertification, and application submission. The portal provides an eligibility screener and income benefits estimator to help prospective beneficiaries determine whether they qualify. Users can start, save, sign, and submit their application; check their application status; and upload requested documentation through the website. Participants can also check their benefit balance and notifications such as account changes or reminders. As needed, participants can recertify and report household and income changes. The website also includes resources and information for SNAP participants, including office hours and locations, frequently asked questions, and location and contact information for community partners. The website is accessible in English and Spanish.

Text/SMS Messaging

SNAP participants in Texas can opt in to receive one-way text messages about their SNAP cases, including alerts about account changes and upcoming due dates.

Functions and purpose. Text message notifications or reminders are automatically generated and delivered to participants when the eligibility system identifies account changes. Participants receive a text confirmation upon receipt of documentation uploads, completed applications, or reviewed applications. Participants also receive a text reminder to renew benefits. SNAP participants receive texts only if they opt in to text messaging notifications through YourTexasBenefits.com.

Mobile Apps

Your Texas Benefits is a mobile app designed for beneficiaries to access SNAP in addition to other social safety net programs.

Functions and purpose. Your Texas Benefits app is available for iOS and Android devices and can be downloaded from the Apple or Google Play app stores. Some of the most used features on the app include balance inquiries, document upload, and recertification. Through the app, users can start, save, sign, and submit their application; check their application status; and upload requested documentation. Participants can check their benefit balance and notifications such as account changes or reminders. As needed, participants can recertify and report household and income changes. The app includes resources and information such as frequently asked questions and location and contact information for community partners. The app is accessible in English and Spanish.

Use of third-party apps for SNAP. Providers is an app participants use for electronic benefit transfer (EBT) balance inquiry. Although Your Texas Benefits also shows participants their current benefit balance, participants report using Providers in favor of Your Texas Benefits for balance inquiry because it tends to be more accurate.

C. History and Implementation of Texas's MCS

To understand the history of MCS in Texas, the study team asked key stakeholders for their impressions of the implementation, continuous improvement, and utility of Texas's MCS. This section details stakeholder perspectives about the impetus for MCS development and improvement, specific SNAP audiences the State targets, marketing and outreach strategies, popularity and uptake of MCS, involvement of community partners, software infrastructure development, evaluation and monitoring of MCS for continuous improvement, and implementation challenges.

The development of MCS in Texas was part of a larger effort to redesign the State's SNAP business processes that began in 2006 when the State launched its first iteration of an online platform, a SNAP application PDF form on its website. In 2010 the State modified its website to be more dynamic and interactive; by 2012 it was modified again to enable all clients to apply for SNAP via the website. In 2013 the State launched an email alert system to provide digital updates to clients on changes to their individual cases.

> *Developing MCS has been] an iterative process of learning and studying how clients like to be communicated with and providing those options.*
>
> —State SNAP director

In October 2014 Texas launched its mobile app. The app's initial purpose was to give clients an opportunity to upload supporting documents for their applications or recertifications. The app and other MCS continued to evolve. The State implemented text messaging in December 2014, with modifications in 2015, for individuals who enrolled in SNAP via the app to sign up for text and email notifications. In 2015 the State also offered clients an option to go paperless with all their SNAP communications.

1. Goals for State MCS

Texas had three primary goals for developing its MCS. The first goal was to move toward a paperless process for clients and capture all client documentation electronically. The second goal was to ensure a "first-contact resolution" when clients interacted with the Health and Human Services Commission. The State's third goal was to enable self-service among clients.

Paperless documentation. Much of the State's technological modernization efforts focused on reducing the amount of paper documentation needed to process applications, recertifications, and notifications. The State moved toward paperless documentation to save costs associated with printing, mailing, processing, and storing hardcopy documents.

First-contact resolution of client issues. The State's business process improvement activities focused on developing systems to reduce the number of separate interactions between clients and the State SNAP agency. This involved comprehensive training efforts to ensure all staff could support myriad of clients' needs and resolve their issue or question in one interaction. The Your Texas Benefits app is regularly used as a tool to resolve issues on the spot. For example, while on the phone with a client, a caseworker could encourage the client to download or open the app and upload supporting documentation, providing technical assistance to complete the needed action as necessary.

Self-service. Improved options for mobile communications enabled clients in Texas to serve themselves without the support of State caseworkers, which was a primary goal. The app, for example, allows clients to upload supporting documentation such as utility bills or paystubs rather than wait in line to drop them off at a local office.

2. Target Audience

Although Texas's MCS for SNAP are intended for all SNAP and SNAP-eligible participants, certain subpopulations were deemed most likely to benefit.

Digitally literate individuals. The State's MCS are most beneficial for individuals who have some existing comfort level using smartphones, computers, tablets, and apps in general.

> *We actually are designing with an understanding [that] the vast majority of our clients will be using a mobile device to view our website.*
>
> —State SNAP staff

Smartphone users. Through analyzing website usage data, Texas SNAP administrators learned that 70 percent of traffic to the website occurs via mobile phones. This finding focused the development of the website on smartphone users by taking a mobile-first approach.

3. Marketing and Outreach Strategies

The State SNAP agency deployed various strategies to inform and encourage SNAP participants to seek out MCS available to them.

Caseworker promotion of MCS. Frontline staff promoted MCS and educated clients on how to download and use the app. One frontline staff member noted, "If I do see that [clients] turn in a paper application, I do try to encourage them to go online the next time or use the app. … I try to encourage them to get the emails and the texts." Frontline staff also promote the benefits of MCS and regularly tell clients that using the app results in quicker processing of their applications and recertifications. Frontline staff were encouraged to remind clients at every interaction that they could go paperless.

Promotional products at local offices. The rollout of the app was part of a larger business process redesign. To promote the use of new technologies, Texas purchased and distributed promotional materials such as mousepads, pencils, cups, and cards to help clients remember their usernames. Frontline staff regularly used the slogan "I'd rather be online than in line" to encourage MCS use.

Local office "change champions." As part of the statewide business process redesign efforts, frontline staff were trained as "change champions" and encouraged to promote MCS among their clientele. These "change champions" followed a train-the-trainer approach to support MCS in their local offices. The State also organized regional competitions to track enrollment in MCS, and State leadership hosted a pizza party for the office with the highest MCS enrollment.

Cell phones and demonstration booths. The State deployed cell phones and demonstration booths to local offices to teach clients how to download the app and provide educational support for clients interested in engaging with MCS.

4. Popularity and Uptake of MCS

Texas launched its MCS with a goal of 70 percent of clients applying for SNAP online. Although Texas deployed its MCS before the COVID-19 outbreak, uptake increased substantially during the pandemic. State staff noted the number of online applications peaked at approximately 85 percent early in the pandemic.

State staff described how their approach to customer satisfaction had always focused on enabling and empowering clients to serve themselves using MCS. As one State staff member described, "We were able to provide really, really good service to all our clients because we had taken that self-service strategy early on."

State staff also said the popularity of MCS could be measured in seeing a reduction in the number of clients coming in person to the local offices. One staff member noted, "The fact that in most cases a client never has to walk through one of our office doors [because they can complete their SNAP business through MCS]—that adds that level of convenience for clients who are in need."

5. Involvement of Community Partners and Other Stakeholders

Texas relied on community partners as a primary avenue to obtain client feedback. The State also trained community partners to support SNAP clients as they engaged with MCS.

> *We provided those partners with the information of how to [help] individuals [navigate] logging in, creating an account, logging into their account, downloading the app...*
>
> —State SNAP director

Share client feedback. The State SNAP office established open lines of communication for community partners to share client feedback on MCS, including pain points or problem areas clients were facing. Community partners also helped the State staff conduct usability testing on MCS with clients.

Engage clients informally to monitor satisfaction with MCS. As Texas moved its business processes online, frontline staff saw fewer clients in person. Texas relied on community partners such as food banks to informally engage with clients. Staff described visiting food banks to interview clients about mobile devices they used and obtain input about functions to build out or improve as part of MCS.

Train community partners as MCS supports. The State SNAP agency provided some community-based organizations training to ensure their staff could support clients in their use of MCS tools. Texas also granted staff at some partner organizations administrative controls to help clients use MCS tools.

6. Software and Data Infrastructure

IT staff in Texas have updated and improved the MCS tools using an agile development process driven by programmatic needs. The staff also completed rigorous testing procedures before rolling out new MCS. The State leveraged contracts with vendors to maintain MCS and trained frontline staff to provide basic technical assistance for clients. Texas implemented several mechanisms to safeguard the data transmitted through the app and website.

Iterative development process. Texas information technology staff described an agile process for MCS development. The iterative development process began with the client self-service portal. Over the past 10 years, the State has redesigned and restructured the MCS tools, working with a third-party vendor to make regular programming updates.

Program-driven updates. New MCS tools or products are driven by programmatic needs. According to IT staff, State program staff who worked directly with clients proposed new projects and ranked them in order of priority. The IT staff then reviewed the ranked list and addressed the changes depending on available technological capacity. The State's focus had been on process optimization and improving user experience (e.g., improve accessibility of communications, use technology to reduce wait times).

Testing procedures. Texas IT staff conduct a significant amount of testing of new and existing MCS. The testing process is ongoing and concurrent with new tool development. After initial testing, the State conducts a "readiness release effort" to address functional performance issues before the release of a new tool or product. Several years ago, the State conducted usability testing and assessed visual prototypes and wireframes with clients with help from community-based organizations. Typically, the State conducts testing with 300–350 individuals.

Contracts with vendors. The YourTexasBenefits.com website, mobile app, and the State's eligibility data system are maintained through a contract with a third-party vendor. This vendor performs similar work for other States, which enables Texas to build its app using existing code from other States. State IT staff described it as a positive mechanism to support innovation.

Basic technology support training for frontline staff. Texas's call center staff are trained to provide basic IT support to clients. For example, the State invested resources to ensure staff were trained to help clients troubleshoot issues they might encounter with the app.

Data security. Maintaining secure data systems for MCS is a constant effort in Texas. The IT staff described two areas of focus: protecting data in transmission using secure transport mechanisms and protecting data in storage. All client data reside on State servers.

7. Evaluation and Monitoring of MCS

The State SNAP agency regularly monitors the use of MCS to gauge successes and pain points. Staff monitor usage metrics, review app store feedback, follow trends over time, and monitor users' device types.

Monitor usage metrics. State staff carefully examine crash reports, page usage, time visitors spend on each web page, and abandonment rates. They use these data to inform changes to the website and the app and improve the registration process. Staff also compare utilization rates to the number of people who successfully sign up for an online account; low utilization indicates a problem.

> *[During] COVID-19 spike … our logins went from 1.5 million a month to almost 3.5 million.*
> —State SNAP staff

Review app store feedback. Texas has assigned staff to monitor users' comments in the app store. If a client reports an issue, staff leave an individualized response to address the issue and ensure client satisfaction.

Follow trends over time. The State SNAP director described how staff tracked outcome measures to ensure technology was still relevant over time. The staff use Google Analytics to track usage weekly and monthly.

Monitor device type. State staff routinely track the types of devices clients use when visiting the website. Through such monitoring, they learned most traffic to the website was via smartphone. This finding informed a shift in the website design to be mobile focused.

8. Implementation Challenges

As expected with most technology-driven initiatives, there were implementation challenges associated with the transition to MCS in Texas.

Challenges with digital literacy and client reluctance. Some clients in Texas, particularly older clients, struggle with technology, do not own smartphones, or are uninterested in using MCS, despite encouragement from frontline staff to lean on friends and family for support. Frontline staff described how some clients accidentally signed up for paperless communications and then got confused when they no longer received SNAP communications in the mail. Some clients were also reluctant to use MCS because of data security concerns, particularly around sharing their Social Security numbers.

> *The elderly, they don't have the smartphones, or if they do, they don't know how to use them. And I try to explain it to them that even if you're not comfortable with the application, your daughter, your granddaughter, they can help you with that.*
>
> —Frontline staff

Desire for more streamlined language. State Staff described a desire to simplify the language used across MCS. However, they said any language used across MCS was reviewed and checked for accuracy by the State policy team. According to State staff, there was "an ever-present tug of war between communications and policy," and they believed the required language was not always clear.

Resource redirection toward pandemic response. In spring 2020 staff had to turn their attention toward responding to the COVID-19 public health emergency. State staff described ideas and innovations for MCS that fell behind schedule because resources were shifted to focus on the pandemic.

Text message limitations. The contract with third-party vendors limits the number of text messages the State can send per year to approximately 10 million. The State SNAP agency therefore must use care when considering what information warrants communication via text.

D. Perceived Benefits and Limitations of MCS Features

Stakeholders shared their perspectives on Texas's MCS and described how MCS implementation affected State and local operations. Stakeholders also shared what resources they believed would help streamline SNAP business via MCS tools.

1. Perceived Benefits

Overall, stakeholders saw great benefits in using MCS to communicate about SNAP with beneficiaries.

Increased efficiencies with paperless processes. Stakeholders described how MCS and a reduction in paper handling for SNAP applications, recertifications, and notifications saved costs and enabled SNAP business to be completed more efficiently than when local offices processed large volumes of paper documents.

Quicker processing. Encouraging clients to use the app to upload supporting documents facilitates quicker case processing and enables new clients to begin receiving benefits almost immediately.

Convenience of self-service. MCS empowers clients to take many aspects of case management into their own hands. The app enables clients to conduct many aspects of SNAP business on their own and therefore reduces or eliminates the need to visit local SNAP offices.

Ability to manage large influx of cases. State staff described how MCS improved their ability to share workloads and case documents among caseworkers across the State. This benefit was particularly important when the State experienced influxes of cases (e.g., during the COVID pandemic, periods of economic downturn).

2. Perceived Limitations

Although stakeholders overall applauded the usefulness of Texas's MCS, they noted some limitations.

Challenges for non-English-speaking clients or those with limited digital literacy. Using and accessing the website and app continues to be a challenge for clients who are not comfortable using technology. These individuals often rely on teenagers or other youth in their households for technology support. Although the website and app are available in English and Spanish, stakeholders believed non-English speakers might also face challenges using MCS.

Confusion over "supporting documents." To apply or recertify for SNAP, clients are required to complete a detailed application by using an online form or filling out a paper application and delivering it to the State SNAP agency. Clients also must submit documents in support of their case (e.g., birth certificate, pay stubs); these are referred to as "supporting documents." Supporting documents can be submitted digitally, or hardcopies can be delivered to the State SNAP agency. When using the app or the mobile-optimized website to apply for SNAP, staff described that some clients filled out a paper application, took a picture of it with their smartphone, and uploaded the photo of their handwritten application rather than complete the digital application form. In these instances, the application entered the system as a "supporting document" and could be missed as a new application, resulting in processing delays.

Complicated password reset process. At the time of the case study, if a client had to reset their password, they needed to call the State SNAP agency for assistance. Staff identified this as an area for improvement to ensure clients had a self-service mechanism to reset their passwords.

Phone data limitations. Some clients, particularly those relying on government-issued flip phones or older devices, may have limited data or phone storage. This issue could restrict clients' ability to receive text messages, download apps, or take photos of supporting documents.

3. Effects of MCS on State and Local Operations

Texas's MCS have led to several improvements in State and local operations, including cost savings, faster case processing, improved communications, and increased efficiencies in workforce management.

Cost savings. Texas's MCS have been associated with cost savings by reducing the amount of printing and mail required to communicate with clients about SNAP. State staff described that one goal of MCS was to offer clients the option to go paperless. This option has resulted in a major reduction in the amount of paper applications and follow-up mail State staff need to print, mail, process, and store on site. Obtaining digital rather than handwritten files from participants also saves staff time needed to process paperwork.

Faster and more efficient case processing. Using MCS to allow clients to upload supporting documents enables caseworkers to process those cases and make eligibility decisions the same day. State staff described how same-day service was most likely when clients used the app. For example, once the State receives a client's application, a caseworker can call the client and instruct them to download the app and use it to upload their supporting documentation immediately; that client could receive their SNAP benefits the next day.

Improved communications. The app enables clients to monitor their application status. Before the app, clients would repeatedly call their caseworker to check their application status. Using the app, clients can learn about changes to their application status as soon as it is posted. One frontline staff member described telling clients, "If you use the app, then you don't even have to wait for me to tell you. … You'll be the first to know, even before me, that your status has now been updated." These immediate and accessible status updates reduce miscommunication between the State and clients.

Reduced need for in-person visits to local offices. By using online tools to apply and recertify, clients are no longer required to make trips to their local offices. Frontline staff reported that before the launch of the app and the website, clients had to wait in long lines to drop off supporting documentation. Now, clients can upload documents and forgo the visit to the office.

> *During Hurricane Harvey, we had an entire Houston area that was off the grid. We shut the offices down; I told the staff, don't come back until your life is in order. But we were only able to do that because of our work management system and the online applications. So I literally took that body of work that was assigned to Houston and shifted it up the coast of the State. People [in other parts of the State] were processing those applications, unbeknown to the [clients] who were in Houston and Harris County.*
>
> —State SNAP director

Improved workforce management. In Texas, business process improvements went hand in hand with MCS development. Moving toward a paperless records management system has enabled large volumes of case management responsibilities to be shifted and shared among caseworkers across the State. Previously, before MCS were deployed and all case materials were paper, each local office was responsible for its own caseload and had to manage local ebbs and flows in case work. Digital workflow management had proven beneficial in Texas during influxes of new residents, natural disasters, the COVID-19 pandemic, or when policy changes led to increased needs for SNAP.

4. Additional Resources Desired

At the conclusion of all interviews, stakeholders were asked what additional resources would improve the usefulness of Texas's MCS for SNAP. Stakeholder responses follow.

Additional Federal funding. Stakeholders in Texas requested additional funding from the Food and Nutrition Service (FNS) and/or more technology grants to support MCS. Texas invested in its MCS by funding the development of the tools using its own discretionary budget, but leadership described limited funding as a deterrent to additional innovations.

Additional technology trainings for clients. Community partners mentioned a need for general technology training to improve digital literacy among SNAP clients. This training would improve clients' ability to fluently engage with MCS.

Opportunities to learn from other States. Stakeholders in Texas believed sharing findings of studies such as this one would help States launching or improving MCS learn from each other. They encouraged FNS to disseminate the lessons learned.

Ongoing advances in MCS to keep up with improvements in technology. Stakeholders identified ways MCS technology could be improved to match new advances. For example, stakeholders thought facial recognition or biometric sign-in technology could be incorporated in the app as a log-in option.

E. Feedback From SNAP Participant Focus Groups

The study team conducted two focus groups with a total of 11 SNAP beneficiaries who had used Texas's MCS to understand their needs and experiences.

1. Participant Use and Awareness of MCS in Their State

Almost all participants were aware of the mobile app, Your Texas Benefits. Participants were also aware of Providers, a third-party app used to check their benefit balance; however, some were surprised to learn it was unaffiliated with SNAP.

Most were aware they could access the website, YourTexasBenefits.com, from a mobile device or tablet and preferred it to accessing via a computer. However, very few participants were aware they could opt in to receive text message communication from the SNAP office.

When asked to think about why a client might want to use a mobile device or tablet to complete SNAP-related activities, participants suggested convenience, security, and accessibility. In contrast, participants suggested a client might not be interested in using a mobile device or tablet for SNAP business because of privacy concerns, limited technological proficiency, or preferences for human interaction.

2. Participant Feedback on SNAP MCS

The study team asked participants to share their experiences with MCS available in Texas. Participants provided insights and suggestions for improvement based on their interactions with the website, app, and, if applicable, text messaging.

Text/SMS Messaging

Three of the 11 focus group participants were aware of or had experience with receiving text message communication from the SNAP office. Two of the participants found the text messages they received to be helpful. More specifically, one participant appreciated the immediacy of text messaging compared with being notified through postal mail. However, another participant noted they did not like the texts from the SNAP office because it made the participant feel pressured to take immediate action to resolve impending or outstanding items in their account.

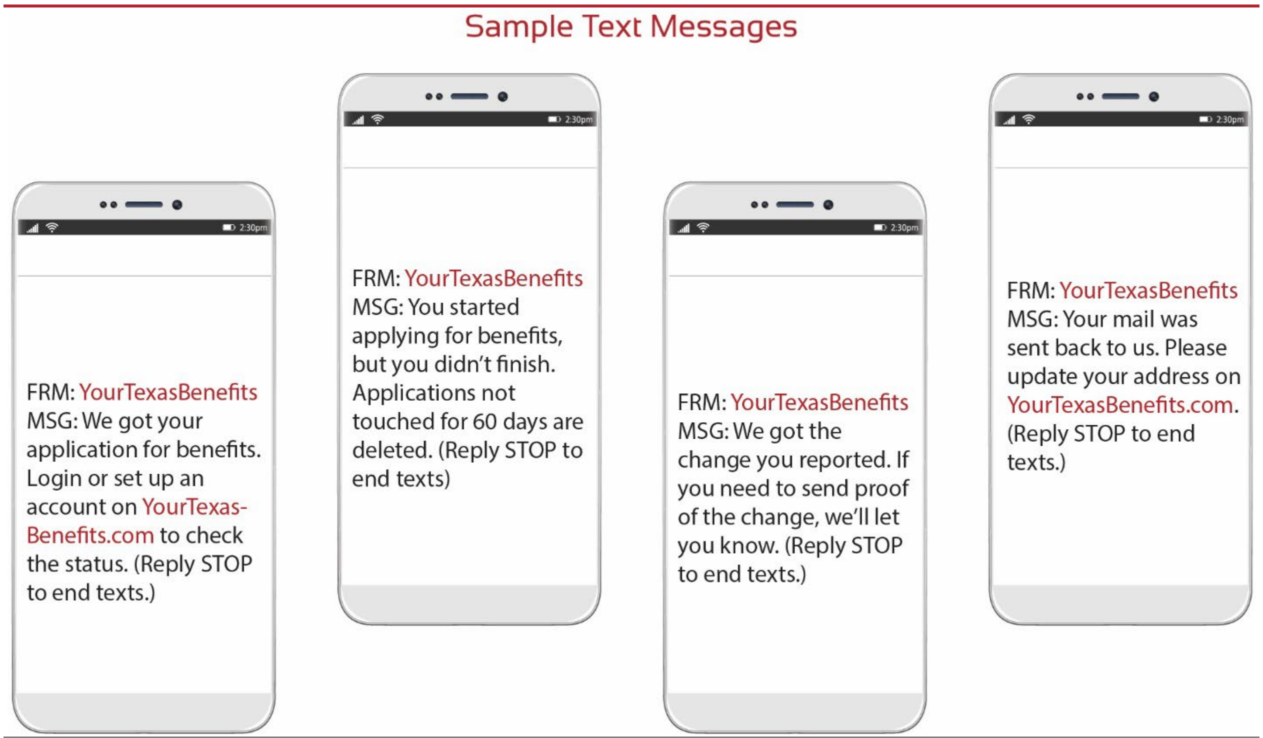
Participants who were unaware of the text message notification system were asked if they would opt in now. Three participants said they were still not interested in receiving texts.

Although most participants had not experienced the text messaging feature, they provided helpful feedback about what they would expect from it. Some participants suggested text notifications that were already in place, such as reminders about recertification and appointments. Other participants suggested notifications via text about low balances in their accounts.

> *I actually don't like when I get the text messages because there's always something bad. It's always saying something like, say, if I didn't turn something in when I actually did or say that I need to do something by a certain date, like, I don't know, it's just like really pressuring text messages, it's never like good messages.*
>
> —SNAP participant

During the focus groups, participants reviewed a set of sample text messages (see figure 2) and were asked for input on each. Participants stated they would appreciate receiving texts like the samples shown because they were clear, concise, and could be stopped at any time. During this conversation, participants also made it clear they would find excessive messaging less useful and prefer texts to be infrequent and refrain from including sensitive information, such as case numbers or security questions.

Figure 2. Sample Text Messages About Applications and Account Changes



Mobile- Optimized Website

The mobile-optimized website, YourTexasBenefits.com, was well received among participants and considered a useful tool. Most participants accessed the website through a mobile device or tablet;

however, some preferred to access it from a computer. Participants who preferred to use their computer said physiological challenges, such as poor eyesight or arthritic fingers, made it challenging to use a mobile device.

Others preferred to use a mobile device or tablet for various reasons. For example, one participant preferred to use their cell phone to access the website and complete SNAP-related activities because the phone was connected to the printer, making it easier for the participant to print documents they wanted to keep for their records. Often participants did not have a computer, so their only option was to access the website from a mobile device or tablet.

Participants suggested improvements to the website, including incorporating a live chat agent, communicating simply and avoiding jargon, and streamlining the password change process. A few participants reported having an issue with password changes that prompted them to contact their local SNAP office for support, further complicating the process.

Mobile App

> *Because the apps ... are just so black and white, it's either this, or it's that. And a lot of us have really special circumstances. ... I need to talk to a human sometimes that I can say I don't fit in all these categories. ... I don't have other options; I'm here to talk to somebody that will listen and understand.*
>
> —SNAP participant

Almost all participants reported using the mobile app, Your Texas Benefits; however, opinions about the utility of the app varied.

Some participants felt the app was more confusing than useful as many participants recounted contacting their local SNAP agencies about issues they encountered while using the app. For example, several participants felt the app was too "cookie cutter," saying it failed to acknowledge special circumstances in their lives. Therefore, participants often contacted their local office to justify their eligibility with a caseworker.

Although some participants found the app helpful, others did not feel the app supported a streamlined case management process. They often felt compelled to reach out to a caseworker for clarification if the app did not effectively address their questions and concerns. Two participants admitted they deleted the app from their mobile devices because it was not as functional as the website. Another participant said they limited their use of the mobile app to "simple things," such as checking their balance, and relied on the website for more involved tasks, such as recertification. In contrast, some participants found the app useful, engaging, and easy to navigate, particularly the recertification feature.

Regardless of opinions on the usefulness of the app, all participants had suggestions for improvement. Several participants suggested improving document upload. Participants were unsure whether their local SNAP office was receiving their paperwork because they did not receive a confirmation of their submission.

Participants suggested including a confirmation receipt that verified their submission once they uploaded the correct documentation using the app. One participant suggested receiving this confirmation via text, email, or within the app itself.

> *When you upload stuff, I feel like, 'did they really get it?' because there's not verification that they got the documents that they need. And it's kind of like a real lack of faith that I'm going to get approved for whatever, you know, I needed.*
>
> —SNAP participant

Some participants offered innovative suggestions for new features. For example, one participant suggested being able to link their EBT card with their mobile wallet, such as Apple Wallet or Google Pay, or through the app itself, such as Walmart Pay.

Participants also commented that they used Providers, a third-party mobile app, rather than Your Texas Benefits to check their account balance and found it unnerving that a third party had access to their personal account data[9]. Another participant said they preferred Providers for checking their balance because it tended to be more accurate than Your Texas Benefits.

Many participants wanted opportunities to provide input for app improvements. One participant shared that they had emailed their local SNAP office with suggestions and feedback but never heard back. Participants believed it would be beneficial for the Texas SNAP agency to incorporate a platform for clients to submit suggestions so they could feel heard.

3. Features of Most Interest to SNAP Participants

Participants were given a list of MCS features and asked to indicate which features they were most interested in for SNAP-related activities. Appendix C.3.a provides the complete list of features available to participants as potential options when answering the poll question.

> *It's easy for people who were evacuating to submit the documents using their smartphone, to understand that they didn't have to have a traditional appointment in our local office because now everything could be done virtual. And I'll be quite honest because we had already started doing that work and laying the foundation; when COVID hit, it wasn't a hard transition for us because we were already doing it.*
>
> —State SNAP director

The features of most interest were the ability to check application status; start, save, and submit an application; submit documents; check a calendar of SNAP-related due dates or receive due date reminders; check balance; and chat live with customer service. Texas's SNAP-related MCS currently offers all the above features, except a calendar of SNAP-related due dates and live chat with customer service.

[9] It is our assessment that the Providers app likely had participant EBT information when they created an account, therefore leading the participants to assume that meant the app was administered by the State SNAP agency because they were the entity issuing benefits; However, learning that it was a third party app likely made them uncomfortable that they did not have a firm grasp of what entity has specific data about them.

Impact of COVID-19 Pandemic on MCS

The COVID-19 pandemic demonstrated the value of having MCS available to SNAP participants and generated more demand for these tools.

- Texas had all MCS in place before the COVID-19 pandemic. As the demand for digital communications increased and local offices closed, Texas merely had to scale up its efforts rather than build them from scratch.
- Paperless applications and MCS facilitate improved workforce management, ensuring caseworkers anywhere in the State could access any client's case file. This feature was proven beneficial not only during the COVID-19 pandemic but during hurricanes or other times when demand for SNAP increased in certain regions of the State.
- Focus group participants appreciated the updated pandemic-related information on the website.

F. Lessons Learned From MCS Implementation

The findings described in this case study report provide an overview of the successes and challenges Texas experienced implementing SNAP MCS. From these findings, table 1 presents lessons learned for successful MCS implementation.

Table 1. Lessons Learned From MCS Implementation in Texas

MCS Marketing and Outreach		
Frontline staff. Leverage frontline staff to promote MCS among clients to ensure clients learn about the tools from their caseworker or other trusted State staff member.	**Eligibility interviews.** Promote the mobile app as a tool during eligibility interviews. When interacting with prospective clients, frontline staff can encourage them to download the app and use it immediately to upload supporting documents. This strategy can increase the likelihood of a speedy case determination.	**Promotion of MCS.** Promote all MCS, including text messaging, which, as an opt-in feature, may go unused by clients.

Technical Considerations	
Apply behavioral messaging ("nudge theory") to text messages and push notifications. It is important to be intentional about the length, content, and frequency of text messages and push notifications. If messages are sent too frequently, they can be considered spam, making each message less effective.	**Implement opt-out text messaging rather than opt in.** Implementing text messaging as opt out rather than opt in enables the SNAP agency to reach more individuals who initially feel indifferent to the receipt of text messages and later find them helpful.

Community Partner Engagement	
Reliance on community partners. Leverage partner relationships to conduct informal engagements with clients about mobile technology, information needs, and suggestions for improvements.	**Training for community partners.** Train partners to support clients in using MCS as a tool for SNAP communications.

Software and Data Systems Development

Confirmations. Ensure clients receive confirmations after submitting applications or supporting documents. This could help build trust in the mobile tools among clients.

Balance inquiries. Ensure accuracy of the balance inquiry feature to keep users engaged with Texas's MCS. Because the third-party app (i.e., Providers) is perceived as being more accurate or immediate in reflecting participants' benefit balance, participants tend to go outside the MCS environment for balance inquiries.

Password reset. Ensure password reset process is user-friendly and self-service.

Listening sessions. Hold listening sessions with SNAP beneficiaries to find out what services or features they would like to see in future iterations of MCS.

Communication through mobile app. Allow clients to communicate through the mobile app via a chat bot or messaging system so they can report additional information based on their own unique circumstances. This could increase the utility of the app and reduce their need to call into local offices for assistance.

MCS Evaluation and Monitoring

Assigned staff. Utilize dedicated staff to monitor and reply to user feedback submitted via the app store.

User feedback. Ensure opportunities for users to provide feedback on the utility of mobile tools.

Solutions to Implementation Challenges

Involvement of target users. Assess the preferences and information needs of target users before developing MCS.

Appendix C.4.a. List of MCS Features Offered to Focus Group Participants

At the end of each focus group, participants were asked to review a list of potential features offered through MCS. They were then asked to indicate the top features they were most interested in with their SNAP MCS regardless of whether those features are currently available to them or not. The list they reviewed is listed below.

- Check your application status
- Use an eligibility screening/income benefit calculator
- Start, save, and submit your application
- Submit documentation about your case
- Communicate electronically with eligibility worker
- Schedule interview
- Report household change
- Report income change
- Receive notifications about any verifications needed
- Receive notifications about your certification or account changes
- Check a calendar of SNAP-related due dates/receive due date reminders
- Review information in a language other than English
- Check EBT balance
- Request and EBT card replacement
- Manage your EBT PIN
- Chat with customer service
- Review FAQs
- Locate community partners/resources
- Check office hours/locations
- Submit questions

Modernizing Channels of Communication With SNAP Participants

Mississippi Case Study Report

insight POLICY RESEARCH

Modernizing Channels of Communication With SNAP Participants Mississippi Case Study Report

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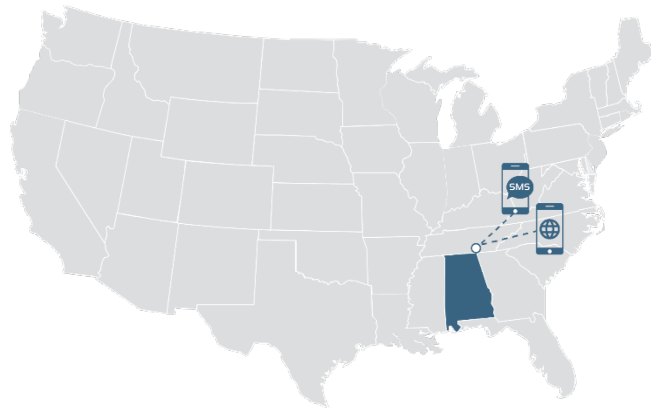
A. Study Overview

The primary purpose of the Modernizing Channels of Communication With SNAP Participants Study is to highlight best practices and lessons learned from various mobile communication strategies (MCS) implemented by Supplemental Nutrition Assistance Program (SNAP) State agencies. For the purposes of this study, MCS include websites optimized for mobile devices, apps for mobile devices, and SMS/text messaging. Through five case studies, the study team sought to examine the experiences of five States related to the development, implementation, and maintenance of MCS. The case studies complement other elements of the study to provide an overview of MCS activities in all States, gather client perspectives on MCS, and synthesize best practices.

Mobile Communication Strategies in Mississippi



To understand best practices and lessons learned from each State's MCS implementation, the study team interviewed key stakeholders, including SNAP State agency staff, community partners, local caseworkers, and third-party vendors, about their roles in the implementation process between August and October 2021. We also captured SNAP participants' perspectives through two virtual focus groups in each of the five States.

This memorandum highlights findings from Mississippi's case study, including an overview of the State's MCS, goals and target audiences for the MCS, feedback from 16 stakeholders, and a summary of perspectives from SNAP participants who use the MCS. The findings below were compiled using detailed analyses of interview and focus group data.

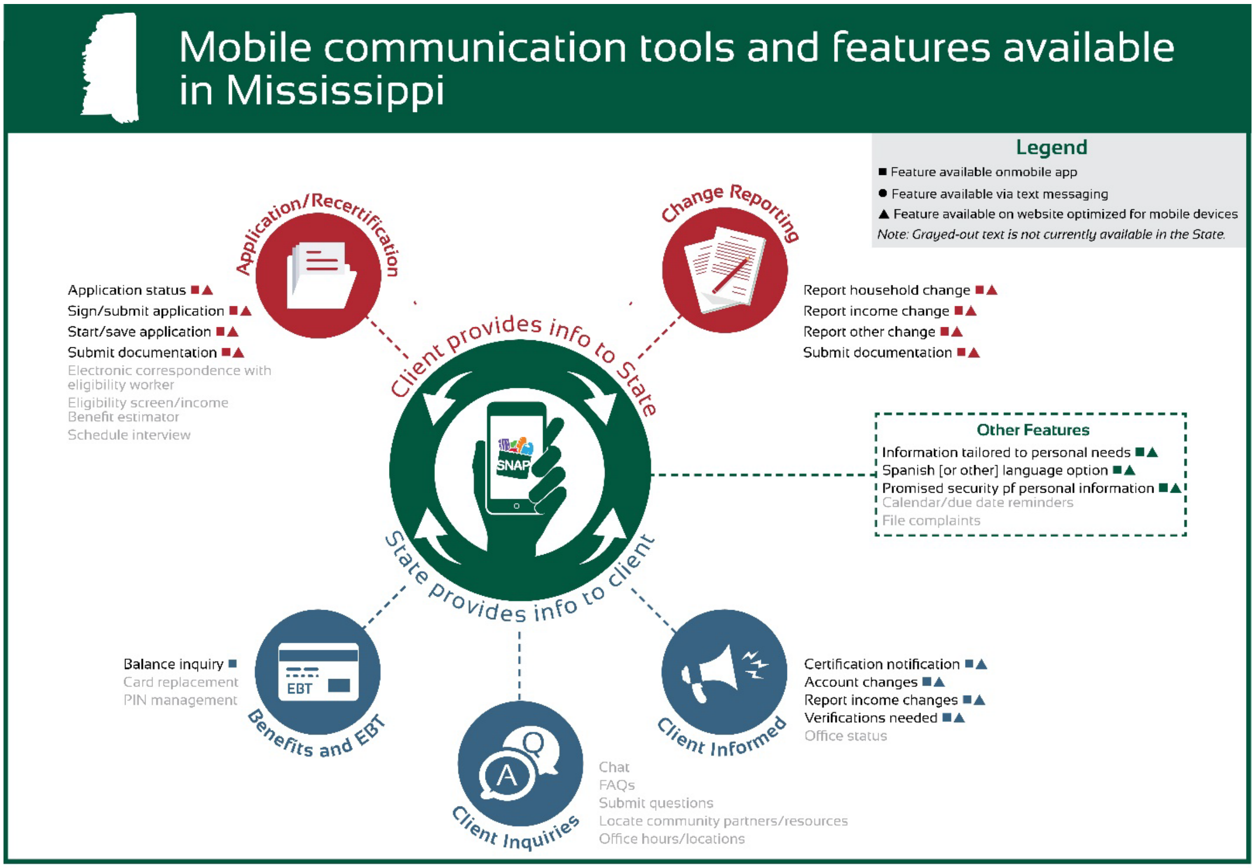
B. Overview of Mississippi's MCS

At the time this case study was conducted (August–October 2021), the State of Mississippi maintained a website optimized for mobile devices and a mobile app for SNAP communication and SNAP-related activities. Mississippi does not currently use text messaging to communicate with SNAP participants. This section describes the function and purpose of the MCS available to SNAP participants in Mississippi.

1. MCS Available in Mississippi

Figure 1 depicts SNAP MCS functionality in Mississippi. As described below, some components of Mississippi's SNAP MCS operate in tandem with other social safety net programs, such as Medicaid, Temporary Assistance for Needy Families (TANF), and the Low Income Home Energy Assistance Program. Although SNAP is independent from other social safety net programs, the goals, target audiences, and functional components of Mississippi's MCS for these programs often overlap.

Figure 1. Mobile Communication Tools and Features Available in Mississippi



Mobile- Optimized Website

The Mississippi Department of Human Services (MDHS) maintains a website portal and mobile app called myMDHS that beneficiaries can use to access personal accounts associated with SNAP and TANF.

Functions and purpose. The mobile-optimized website offers users options to start and save their application, check the status of their application, submit documentation, receive notifications, and check their electronic benefits transfer (EBT) balance. Several features, such as reporting income changes, making account changes, and submitting documentation, can be initiated via the website; however, the client is routed to a separate app called Economic Assistance (EA) Document Upload to complete the submission.

Mobile Apps

SNAP and TANF recipients can manage their benefits via the myMDHS mobile app.

Functions and purpose. The myMDHS mobile app enables users to conduct the same SNAP-related activities the myMDHS website does. Similar to the website, clients are routed to the EA Document

Upload app when they need to report income changes, make account changes, or submit documentation.

The myMDHS mobile app was launched in 2017. Until recently, the activities offered on the myMDHS website and the myMDHS mobile app differed from each other. For instance, for much of the mobile app's existence, users could not use it to start an application. However, in late September 2021, approximately halfway through data collection for this case study, the mobile app underwent an upgrade, bringing the two MCS more in synch with each other and enabling potential SNAP clients to initiate their application process via the mobile app. Prior to this change, clients could only receive information about their benefits via the mobile app if they had already qualified. The upgrade also added push notifications to the app.

Use of third-party apps for SNAP. Clients can use the Providers app (previously called Fresh EBT) for instant updates to EBT balances across social safety net programs. This app is not managed by the SNAP State agency but is popular among SNAP recipients.

C. History and Implementation of Mississippi's MCS

To understand the history of MCS in Mississippi, the study team asked key stakeholders for their impressions of the implementation, continuous improvement, and utility of Mississippi's MCS. This section details stakeholder perspectives about the impetus for MCS development and improvement, specific SNAP audiences the State targets, marketing and outreach strategies, popularity and uptake of MCS, involvement of community partners, software infrastructure development, evaluation and monitoring of MCS for continuous improvement, and implementation challenges.

Mississippi first developed the myMDHS mobile app and website to give clients access to their benefit amount and electronic notices. According to stakeholders, many clients did not use the app because its functionality was limited.

1. Goals for State MCS

The primary goals for developing and improving Mississippi's MCS included enhancing clients' experience with and access to SNAP, cutting costs by using electronic notices, and improving communication with clients.

Enhance clients' experience with and access to SNAP. MCS aim to enhance program access and make all aspects of the application process and any communication with local SNAP offices easier for clients. MCS can accomplish these goals by removing barriers, such as the time it takes to travel to and wait at a local SNAP office, and streamlining document submission by enabling clients to upload documents via MCS rather than mail them.

Cut costs by using electronic notices. Prior to the development of the myMDHS app and website, notices were sent via paper mail. Electronic notices are emailed to clients and posted to their myMDHS account. These communication methods cut costs and reduce caseworker time compared with mailed notices.

Improve communication with clients. State staff reported that some clients were not responding to mailed paper notices; they either did not receive them because of a recent move or were not taking action after reading them. The myMDHS app and website provide electronic notices to clients wherever they are. Recently added push notifications for the mobile app informing clients of available messages further augment communications.

Improved communication can help clients stay updated about their case and reduce administrative churn. Churn occurs when a SNAP participant exits the program for a period of time and has to reapply for benefits. Participants can lose or have a lapse in their benefits as a result of procedural issues or miscommunication. Churn is a significant concern among MDHS staff.

2. Target Audience

While Mississippi's MCS for SNAP are intended for all SNAP and SNAP-eligible participants, MDHS considers certain subpopulations, including transient clients and clients who need reminders about action required on their case, especially likely to benefit from these practices.

Transient clients. Transient clients are often hard to reach because they do not have a permanent address to receive paper notices, but these clients can access electronic notices through the myMDHS app from any location.

Clients who need reminders. Some clients struggle to manage their case information and remember when they need to recertify or provide additional information about their household; this is especially true in response to temporary program rule changes. MDHS recently began using mobile app push notifications to remind clients that they have a message about their case in their account. Clients are also able to choose to receive these notifications by email. If an email is not opened by a client or if the system receives a returned (bounced) email, the system automatically sends the client to paper-based notifications to prevent a lapse in communication.

3. Marketing and Outreach Strategies

MDHS deployed various strategies to share information about and encourage SNAP participants to seek out MCS available to them. These strategies included social media, word of mouth, and email and paper notices. MDHS also described their marketing and outreach strategies for updates to the myMDHS mobile app.

Social media. The most common method the State uses to communicate with clients about MCS features and updates is social media. MDHS typically posts on Facebook, Twitter, and Instagram. These postings have been a fast and reliable way to provide information on updates to MCS and inform clients about maintenance issues.

Word of mouth. When caseworkers interact with SNAP clients, they inform them of the MCS and SNAP-related activities that can be performed via the mobile app and website.

Email and paper notices. When offices closed at the beginning of the COVID-19 pandemic, notices were sent through mail or email encouraging clients to submit applications through the website and email documents to their local SNAP office. When the EA Document Upload app was created a few months into the pandemic, an additional paper or email notice was sent to let clients know to upload documents via the portal instead of sending them by email.

Marketing myMDHS updates. One community-based organization (CBO) reported that it knew little about the updated myMDHS app because there was no information about it on social media. MDHS staff explained they were doing a "soft launch" and did not market the updated app until they felt comfortable with the added feature to ensure client trust in the product once any lingering technical issues had been resolved.

4. Popularity and Uptake of MCS

According to stakeholders, the website was more popular than the mobile app because it had more functionality. However, the mobile app's popularity has increased with recent updates. Stakeholders also reported an increase in the use of the mobile-optimized website and the mobile app since the onset of the COVID-19 pandemic.

Website popularity. Overall, the website was described as more popular than the mobile app because of the mobile app's limited functionality. One community partner noted that they were not aware of many people who applied through the app, even though the feature is now available.

Difference in preferences by age. Stakeholders reported that MCS were more popular among younger clients, who are more comfortable with mobile technology. Specifically, younger generations prefer the app to the website. In contrast, older clients were more likely to use the website. One community partner who primarily worked with the senior population said very few of their clients felt comfortable using the app, but they frequently used the website.

Updates to the mobile app. Since late September 2021, when the mobile app added application submissions functionality, the number of accounts created has grown substantially. Stakeholders shared that before SNAP clients could apply and recertify through the mobile app, the app was averaging about 92 accounts created per month. In just the 3 weeks between the launch of the application process functionality and data collection for this case study, over 3,000 accounts were created.

Effects of the COVID-19 pandemic on uptake. The inability to visit local SNAP offices substantially increased clients' use of MCS. Stakeholders shared that some clients who were initially hesitant to use MCS because of data security concerns started to submit applications through the website because it was faster than mailing the documents to the office.

5. Involvement of Community Partners and Other Stakeholders

MDHS worked with multiple stakeholders during the development and implementation of MCS. These stakeholders provided their perspectives on the various functions of the website and mobile app and their perceptions of SNAP clients' experience with the MCS.

SNAP workgroup. Development and implementation of MCS can be done in multiple phases to best serve clients. MCS can be deployed once they are functional, and updates can be made following the initial deployment. MDHS and CBOs formed a SNAP workgroup that holds quarterly meetings to discuss SNAP in their State. During these meetings, the CBOs provide feedback on what MCS features work well and offer suggestions for improvements based on client feedback. The State staff and one community partner noted that the workgroup was very useful for facilitating a conversation about improvements to SNAP and MCS.

Integrating services. One CBO worked with MDHS on integrating other services into the MCS. The CBO discussed developing a "food finder" for the website to help clients search for nearby accessible food sources (e.g., local food banks, stores that accept SNAP). They also discussed incorporating nutrition education (e.g., cooking messages, videos) on the myMDHS app.

> *I think when we are engaging with the agency—in this case, MDHS—it is always great to have constant communication and have a more frequent communication, rather than following a waterfall method, which is basically getting all requirements upfront and then talking about it 7 months later, because things keep changing very frequently.*
>
> —Information technology (IT) vendor

Frequent communication. It is important for stakeholders and MDHS to communicate throughout the MCS implementation process to monitor unexpected or unanticipated changes. Continuous and frequent communication among stakeholders directly affected by MCS and MDHS ensures transparency and usefulness.

6. Software and Data Infrastructure

To understand how MDHS data relate to various social services, MDHS enlisted the help of a research center at Mississippi State University called the National Strategic Planning and Analysis Research Center (NSPARC) in 2014. NSPARC helped MDHS modernize and simplify its hardware and systems for collecting and using participant data, and together, the organizations determined that a mobile app for managing benefits would provide the best user experience for SNAP clients. They agreed that NSPARC would build a mobile-optimized website and a mobile app that worked with iOS and Android mobile devices.

Limited functionality to start. Functionality of the client-facing mobile app and mobile-optimized website was limited at first but expanded over time. The first versions of these tools only provided users with official SNAP notices, the ability to check their balance, and electronic notices about when their balance would be replenished.

> *The very first version of the app, we even went to Dollar General, and we looked at some of the phones that are available on the kind of pay-as-you-go plans and made sure we targeted Android versions that were the versions of the Android operating system that are on those phones, too.*
>
> —IT vendor

Clients with different types of mobile devices. Concerns arose at the start of the myMDHS mobile app development about clients' ability to benefit from MCS depending on the type of mobile device they used. In response to those concerns, the app was designed to ensure clients with different types of mobile devices (e.g., iPhone, Android phone, iPad) could use the myMDHS mobile app.

Document upload app. Local office closures in response to the COVID-19 pandemic introduced an immediate need for clients to be able to upload their SNAP documentation from their phones or computers. The EA Document Upload app was built by internal IT staff, while the storage of uploaded documents was managed through a third-party vendor. This app was separate from the myMDHS app but worked in tandem with it. One stakeholder shared that adding an external partner to this process created some logistical inefficiencies on the back end IT systems in the long term, but believed it was the best option at the time because of the urgency of the situation.

Expanded functionality with new grant funding. With growing support for MCS from State leadership, in 2017, MDHS was awarded a Process and Technology Improvement Grant (PTIG) from USDA to implement improvements and upgrades to its MCS tools. NSPARC collaborated with MDHS on this grant to identify the aims and the plan for achieving those aims.

Reduced churn. The primary goal for improvements was to reduce churn. One strategy was to implement mobile app push notifications alerting users to new information related to their account, such as electronic notices or reminders about recertification deadlines. NSPARC explained that these push notifications were crafted so that they could easily be converted to text messages to alert SNAP clients to changes to their case, if MDHS chooses to do so.

> *We also built it pretty generically; if the agency ever wanted to modify and send the text messages as well, they could do that. ... We're using Twilio, which is a programming interface for sending messaging to people.*
>
> —IT vendor

Fully remote application process. Another goal of the PTIG funding was for clients to gain the ability to apply and submit documentation through the mobile app so all their paperwork would be collected and ready for processing when they had their interview. Prior to the upgrades, new clients could not start, save, or submit an application via the mobile app.

Multilanguage functionality. PTIG funding also enabled MDHS and NSPARC to upgrade the website and mobile app to offer multiple languages. At the time of this case study, SNAP clients could operate the mobile app in English, Spanish, and Vietnamese. These languages were chosen based on the populations using SNAP in Mississippi.

Automatic paper notifications with email bounces. Another upgrade made with PTIG funding was to institute automatic paper notices when emails bounce or electronic notices are not opened. Back end systems recognize if SNAP clients are not receiving electronic notices (e.g., if email address is not functioning or entered incorrectly, if user neglects to review notices) and trigger an automatic paper notice to be sent to the mailing address on file. This feature aims to decrease churn by reducing the chances of clients missing their notices to recertify or provide verification documentation.

> *One of the things that the team has done really well is that they literally built switches on and off for different parts of the functionality in the app. So if the agency says, "There's a new rule about this; we cannot use this form anymore," we can switch it off very quickly.*
>
> —IT vendor

Ease of feature control on the back end. NSPARC shared that one important tool incorporated into the back end of the app was the ability for MDHS to easily enable and disable different features to ensure that if the agency needed to update one element, it would not have to disable the entire app to do so.

Scrum approach to testing software. NSPARC used a Scrum Testing approach to test the MCS. Scrum Testing requires a short, fixed schedule of release of each function. SNAP caseworkers were asked to test the original version and the upgrades of the website and mobile app. Testing occurred frequently and regularly (every 2 weeks) to ensure each step of the development process was successful before proceeding to the next stage.

Train-the-trainer approach with caseworkers. NSPARC held "train the trainer" events to teach regional staff how to use the tools, with the expectation that they would meet with their local staff and train them. The goal was to train county caseworkers to be prepared for SNAP clients using the MCS.

> *Sometimes they would organize sessions where they would give people a whole day to have the caseworkers from the county offices come and test. And that was great—a lot of undivided attention.*
>
> —IT vendor

Partnership with a university. Often, private IT consultants offer a standard product with specific features that can be customized to an extent, although the product may not meet all the needs of the State agency. Partnering with a university research center to develop the MCS facilitated the development of a highly customized product. However, the partnering process can be bureaucratically difficult, depending on State agency rules.

7. Evaluation and Monitoring of MCS

As discussed in section 5, MDHS regularly engaged with stakeholders to gauge the success and limitations of Mississippi's MCS. The State agency also reviewed website analytics to understand how MCS addressed churn and conducted internal quality control to ensure MCS were working appropriately.

Use of MCS analytics to decrease churn. Analysis can be used to determine if churn has decreased based on the use of the myMDHS app. NSPARC provides MDHS with information about uptake via Google analytics. Clients' login details and traffic volume can be tracked to help inform administrative changes to decrease churn.

Internal quality control. IT staff explained that they receive daily reports from the IT vendor that stores documents submitted via the EA Document Upload portal and the mobile app. These daily reports include the number and types of documents the IT vendor receives from the portal and the app. IT staff then match that information with information submitted by clients. If any discrepancies arise, IT staff reprocess the documents submitted by clients and resend them to the IT vendor to make sure all documents are appropriately stored.

8. Implementation Challenges

> *So that's one of the things that kind of affects the flow, because there's institutional memory that comes along with that kind of tier of the organization. And so, when you lose people who had that memory about the application, then the priorities can change pretty quickly.*
>
> —IT vendor

Changes to SNAP policies and priorities at the leadership level complicated the MCS development and implementation process. Stakeholders noted that partway through the process, changes to Federal and State SNAP policies required revisions and adjustments to the functionality of the mobile app and the website. Mississippi's governor's administration also transitioned to new leadership and, in turn, new priorities. This turnover led to the replacement of staff knowledgeable about the MCS with staff who were new to the agency. These changes created challenges for the NSPARC team in gathering and building the business requirements for the technology.

D. Perceived Benefits and Limitations of MCS Features

Stakeholders shared what they perceived to be the benefits and limitations of Mississippi's MCS and offered their perspectives on resources they believe would help streamline SNAP business via MCS tools.

1. Perceived Benefits

Overall, stakeholders agreed the ability to use MCS improves access to benefits for the SNAP population for the following reasons.

Reduced churn. Many SNAP participants struggle to find time to visit a SNAP office because of their work schedule. Allowing clients to apply or recertify online facilitates enrollment and prevents lapses in benefits. The recent addition of push notifications to inform clients when they have a new notice in their account benefits those who do not check the mobile app frequently. Caseworkers believe that these benefits, taken together, will reduce churn by decreasing the number of individuals who miss their recertification deadlines.

Ability to reach clients with limited access to computers. Many SNAP clients in Mississippi do not have access to a desktop or laptop computer. Access to a mobile-friendly website and the mobile app enables these clients to submit applications, recertifications, and verifications using their mobile device.

Faster information dissemination to clients. The mobile app offers clients easier access to their case information because they more often have their mobile devices with them than their computers (if they have one).

Faster updates for new SNAP clients. The mobile app now allows individuals who are not yet enrolled in SNAP to initiate and submit an application online. Accordingly, more individuals can enroll in SNAP and get immediate notifications regarding their case status rather than wait for a notice to arrive in the mail.

Referrals to other programs. SNAP participants are provided with workforce-related questions when they apply. Based on their responses, the mobile app and website can electronically refer applicants to other State programs that may benefit them (e.g., vocational rehabilitation, adult education).

2. Perceived Limitations

While stakeholders approved of the utility of Mississippi's MCS overall, they identified some persistent limitations.

Lack of scheduling features. Clients are unable to schedule appointments using MCS. Typically, caseworkers will schedule clients for the next time available on their calendar rather than determine a convenient time for the client. Caseworkers believe that allowing clients to schedule their own appointments would increase convenience for clients and decrease the number of appointments that caseworkers have to reschedule.

Format of electronic notices on the mobile-optimized website. One stakeholder noted that their clients experienced challenges when they downloaded a document from the mobile-optimized website to their phones because the document is in PDF format. Clients stated that they did not know where the downloaded PDF was saved and needed to ask the community partner's staff to download the information and email them a copy. Stakeholders noted that clients would benefit from the ability to view these notices without being required to download them first.

Rural areas with limited broadband and cellular data access. Although the MCS mitigated issues with broadband access for regions with cellular data service, some regions of Mississippi have neither broadband nor cellular service, and some SNAP participants in rural areas have data limits on their cell phone plans. SNAP clients in these regions must conduct their business through nondigital channels such as paper mail or in-person office visits.

Access to text messaging. Mississippi currently does not use text messaging to communicate with SNAP clients. Stakeholders believe that text messaging could be a helpful way to notify clients, particularly those who disable push notifications on their mobile devices.

Data security concerns. Some clients are still hesitant to use MCS because of data and privacy concerns. Some clients who started using MCS during the pandemic completed their electronic applications without key information such as a Social Security number, phone number, or email address. These omissions make it challenging to connect with clients and often result in their application stalling in a preregistration queue.

3. Effects of MCS on State and Local Operations

The implementation of Mississippi's MCS affected the application, document tracking, and client notification processes.

Changes to application and document tracking processes. Caseworkers reported that the application process has been enhanced the most by MCS tools. Prior to MCS, applications were mailed to clients to be completed and returned. Now, staff spend less time mailing individual applications because clients can complete their application online. Caseworkers also noted that processing electronic applications and tracking the necessary documentation is easier than with paper applications because the documents are already in the back end system and do not need to be scanned and then indexed.

In the past, individuals who were new to the SNAP program were required to visit their local office to apply for benefits in person. With the most recent myMDHS update, these clients can now apply online for SNAP, and this functionality decreased the number of people contacting the office.

As described in section B, in response to the COVID-19 pandemic, the EA Document Upload app was created to reduce the burden on SNAP staff. This feature was added to the mobile app in the September update. Prior to the pandemic, clients who submitted required documentation to their caseworker via email were responsible for including all necessary information to update their case (e.g., case number, document type). If this information was not included, caseworkers would have to spend considerable time corresponding with the client to get the required information. Caseworkers also had to spend time sorting through the inbox to which documents were sent, which proved difficult when the volume of documents increased substantially during the pandemic. Having documents submitted and indexed electronically provides caseworkers access to all documents and other relevant information related to a client's case in one place and enables them to take more immediate action.

Less time updating clients about notices. Caseworkers stated that calls to their unit had decreased because clients are informed that they should check their notices on the mobile app.

> *It really came full force, and now the public is used to uploading documents and doing online applications. And it has helped us—helped the staff, I should say—handle things faster. It's more automated. So ... it's been good, it's been positive.*
>
> —SNAP Director and State staff

4. Additional Resources Desired

At the conclusion of all interviews, stakeholders were asked if they believed additional resources would improve the usefulness of Mississippi's MCS for SNAP. Stakeholder suggestions included technology-specific funding, MCS experts, and the ability to conduct direct engagement with SNAP clients.

More access to PTIG funding. PTIG funding was described as a major facilitator in launching new MSC initiatives and updating current systems. State agencies can receive PTIG funding every other year. Having the ability to receive funding annually would enable State agencies to implement new technology and make updates more frequently.

Additional technology resources. One stakeholder explained that it would be helpful to have access to a technology expert who was not associated with the State agency. They could assess the MCS and make recommendations on any updates or best practices they think the State should implement.

Talking with SNAP clients. Although MDHS does meet with stakeholders who work with SNAP clients, the agency does not get feedback directly from SNAP clients. One stakeholder believes it would be helpful for MDHS to conduct focus groups or interviews with clients to better understand their preferences and experiences with SNAP MCS.

E. Feedback From SNAP Participant Focus Groups

The study team conducted two focus groups with a total of seven SNAP beneficiaries who had experience with Mississippi's MCS to understand their needs and experiences.

1. Participant Use and Awareness of MCS in Their State

Participants found the use of MCS for SNAP-related activities to be helpful when trying to avoid visiting the SNAP office. Participants explained that MCS saved them time and enabled them to conduct their SNAP business when they lacked reliable transportation. Participants also found it helpful to be able to check their EBT balance on the go, check upcoming appointments, and submit verification information and applications.

Participants cited security concerns, privacy concerns, discomfort with technology, lack of mobile device, and a preference for face-to-face interactions as reasons SNAP clients may be hesitant to use MCS.

2. Participant Feedback on SNAP MCS

All the focus group participants had experience using the myMDHS mobile app and mobile-optimized website for SNAP-related activities. Overall, all participants said these tools made their lives easier, and they would recommend the app and the website to other SNAP participants, stating that they made it easier to not have to go into the office and were also safer during the pandemic.

Mobile App

Most participants reported using the myMDHS mobile app about once a month. One person said they used it every time they went to a store to check their balance. Most participants learned about the app from the caseworker at their local office when they applied or recertified for SNAP. One participant recalled seeing it advertised on social media.

> *The nice thing about the app is it goes where you go. I wouldn't want the website to completely replace the app.*
>
> —SNAP Participant

Ease of use. The SNAP-related activities participants conducted on the myMDHS mobile app included submitting verification information, submitting applications, and checking notices. One participant explained that submitting documents directly from their mobile device was easiest because the document comes directly from their phone images rather than having to scan documents into their computer. Overall, participants felt the mobile app was straightforward and easy to use.

Areas for improvement. Overall, participants thought more SNAP clients used the third-party Providers app regularly to check their EBT balance than the myMDHS app. Participants explained that they did not frequently check the app and therefore would like to receive a text or a push notification alerting them of an update to their account.[10] One participant reported recently deleting the myMDHS app because they rarely needed to recertify as a result of their disability and found the Providers app easier to use to track their EBT balance. While some participants had mixed feelings about the utility of the app, they did not want to lose the option of using the app.

Mobile- Optimized Website

Similar to the mobile app, most participants learned about the myMDHS mobile-optimized website from their local caseworkers. Nearly half of the participants reported finding the website via Google search, and one participant decided to look into it because they had questions about their benefits and were not able to locate a caseworker. Participants used the website mostly during recertification time or to check their EBT balance.

Positive experiences. Overall, participants felt the process of creating and using their account through the website was straightforward. One participant explained that they relied on the website for the most current and reliable information because mail notifications were often outdated by the time the beneficiary received them. Some participants appreciated that the frequently asked questions section often referred clients to the MDHS Twitter feed, because they felt it was the most current way to get information. Participants also liked being able to submit applications and documents through the website.

[10] Push notifications were enabled 3 weeks prior to the focus groups; therefore, most participants likely had not experienced them yet.

One person said they did not feel they needed the mobile app if they could perform the same actions on the website. They explained, "I'm just wasting space on my phone if I download the app and I do everything that the app can do online."

Areas for improvement. Overall, participants liked conducting business on the website but had minor suggestions for improvement. Participants would like a way to view notices without being required to download the PDF first. They also would like the notices to appear in chronological order in their account; this issue caused confusion for multiple participants. Participants would also like their account to show unread messages on the landing page when they first log into their account. Participants felt that uploading documents via the website was easy but would prefer a document receipt to feel confident their documents were submitted properly and received. Participants noted that in the past they submitted documents via email, but the caseworker was unable to confirm receipt. In addition to document receipt, they requested the ability to view all documents they have uploaded within their account on the website and the mobile app.

Website access on a mobile device. Participants preferred the website over the mobile app and preferred to use the computer rather than a mobile device. It is worth noting the features available on the mobile app improved just 3 weeks prior to the focus groups, and this perspective may currently be different. The size of the computer suits some participants better than the small screen of a mobile device.

> *I prefer to do everything from the website if I can, because it's just hard for me to see a phone ... and my eyes aren't very good. ... I have a 42-inch TV here that I use for a computer screen.*
>
> —SNAP Participant

Text/SMS Messaging

> *Sometimes I miss their call or email, and I don't like getting all that mail.*
>
> —SNAP Participant

While Mississippi does not currently use text messaging to communicate with SNAP recipients, focus group participants were asked about their preferences and expectations from a text messaging feature. Nearly all participants reported they would opt in to receive text messages about their SNAP account. They would prefer to receive texts alerting them about missing documentation, appointment reminders, new notices available in their account, receipt of document submission, information about emergency SNAP benefits, and food pantry promotions.

While participants expressed enthusiasm surrounding the prospect of text messaging, they wanted to caution against receiving too many texts; if that were the case, they thought the messages would be ignored.

3. Features of Most Interest to SNAP Participants

Participants were given a list of MCS features and asked to indicate which features they were most interested in having for their MCS for SNAP-related activities (appendix C.5.a). The activities of most interest were requesting EBT card replacement, submitting documentation, checking application status, checking EBT balance, and receiving text message alerts about account changes or updates.

Impact of COVID-19 Pandemic on MCS

The COVID-19 pandemic demonstrated the value of having MCS available to SNAP participants and generated more demand for these tools.

- When local SNAP office closures created a need for a mechanism to manage SNAP benefits electronically, the mobile-optimized website and mobile app helped minimize barriers to accessing benefits.
- The increased volume of electronic SNAP applications prompted the rapid development of the EA Document Upload app for application and recertification document submission, first through the mobile-optimized website and later through the mobile app.
- Popularity and uptake of SNAP MCS increased in response to the COVID-19 pandemic. Stakeholders shared that several clients who were initially hesitant to use MCS for SNAP-related business because of data security concerns started to submit their information via MCS because it was faster than mailing documents to the office.

F. Lessons Learned From MCS Implementation

The findings described in this case study report provide an overview of the successes and challenges Mississippi experienced while implementing SNAP MCS. Table 1 presents lessons learned for successful MCS implementation.

Table 1. Lessons Learned From MCS Implementation in Mississippi

Stakeholder Engagement and Communication		
Maintain consistent communication between State agency and partners. Community partners offer expertise and access to SNAP participants and SNAP-eligible individuals. These partners have a unique understanding of the needs of SNAP participants and can offer invaluable feedback on MCS design and outreach. Forming a SNAP workgroup that includes input from community and IT partners is also important to ensure necessary considerations are regularly disseminated to those who are building and upgrading MCS tools.	**Engage SNAP participants**. Engagement of SNAP participants during the development of MCS is vital to understand their needs and preferences. When possible, SNAP participants should be included in the testing of MCS before implementation. Both stages of engagement can include interviews and/or focus groups.	**Use social media.** The wide reach and low cost of social media facilitate communication with eligible citizens about SNAP benefits and other social safety net programs they may qualify for. Social media also facilitates information sharing about new features available on MCS and updates on temporary maintenance on the website or mobile app.
Financial and Human Resources		
Seek funding for MCS development and improvements. Obtaining funding specifically intended for MCS development and future improvements, such as PTIG funding, is instrumental to obtaining buy-in from leadership and ensuring high-quality execution and continuous improvement of MCS tools.	**Ensure seamless transitions between State staff.** Ensure that all staff involved in MCS development and implementation are fully informed about each part of the process to ensure MCS development and implementation remain on track and achieve the intended goals.	**Involve technical experts and program experts**. Involvement of necessary experts such as software developers, IT infrastructure experts, policy experts, and content experts enhances the State's ability to resolve any issues that arise during implementation.
Important MCS Features		
Autogenerate paper notices. Autogenerating paper notices for SNAP clients who do not open their electronic notices or whose emails are returned creates an opportunity to decrease churn by using alternative methods to contact SNAP clients about their case.[11]	**Use push notifications and text messaging.** Push notifications and text messages are a simple way to alert SNAP clients about updates to their account. Incorporating these features creates an opportunity to decrease churn by reaching more SNAP clients in ways that get their attention. Text messages could be particularly useful for reaching clients when push notifications are disabled.	**Offer access in multiple languages.** Offering multiple languages across all MCS creates a better user experience and gives SNAP clients more independence in managing their benefits.

[11] If the State finds the household's email address is invalid or inactive, the State must automatically resume providing the household with paper notices. See FNS's Electronic Notice Waivers and Options memo for more information on electronic notice requirements.

Important MCS Features, Continued

Implement back end switches for each feature. Building the MCS tools to enable turning features on and off on the back end is helpful to maintain the functionality and utility of the tools when certain aspects need updates.	**Acknowledge document receipt.** SNAP clients often spend time calling caseworkers because they are unsure if their documents uploaded correctly. MCS systems can be designed to automatically send a receipt to SNAP clients acknowledging documents they upload. This receipt can be in the form of a text message or an email.	**Provide document access from user accounts.** SNAP clients would benefit from being able to view uploaded documents within their MCS accounts. SNAP clients often send duplicate copies of documents because they are not certain which documents the SNAP agency already has on file for their case.
Offer multiple formats for viewing electronic notices. MCS systems can be built to enable SNAP clients to view their electronic notices in formats other than downloadable PDF. SNAP clients often are unable to locate the PDF document after download and resort to calling a caseworker to email them their notice. Incorporating more formats for viewing electronic notices will relieve the burden on caseworkers and SNAP clients.		

Note: IT = information technology; MCS = mobile communication strategies; PDF = portable document format; PTIG = Process and Technology Improvement Grant

Appendix C.5.a. List of Mobile Communication Strategies Features Offered to Focus Group Participants

At the end of each focus group, participants were asked to review the following list of features that could be offered through mobile communication strategies (MCS). They were then asked to indicate the features they were most interested in for their SNAP MCS regardless of whether those features are currently available to them or not. The list they reviewed is presented below.

- Check your application status
- Use an eligibility screening/income benefit calculator
- Start, save, and submit your application
- Submit documentation about your case
- Communicate electronically with eligibility worker
- Schedule interview
- Report household change
- Report income change
- Receive notifications about any verifications needed
- Receive notifications about your certification or account changes
- Check a calendar of SNAP-related due dates/receive due date reminders
- Review information in a language other than English
- Check EBT [electronic benefits transfer] balance
- Request an EBT card replacement
- Manage your EBT PIN
- Chat with customer service
- Review FAQs [frequently asked questions]
- Locate community partners/resources
- Check office hours/locations
- Submit questions