Schedule 13

Department of Health Care Policy and Financing

Funding Request for The FY 2020-21 Budget Cycle

Request Title

R-06 Improve Customer Service

Dept. Approval By: _____

OSPB Approval By: _____

_____ Supplemental FY 2019-20

_____ Budget Amendment FY 2020-21

X _____ Change Request FY 2020-21

Summary Information	Fund	FY 2019-20		FY 2020-21		FY 2021-22
		Initial Appropriation	Supplemental Request	Base Request	Change Request	Continuation
	Total	$128,851,273	$0	$126,559,473	$3,428,079	$1,337,925
	FTE	500.0	0.0	504.1	4.3	4.5
Total of All Line Items Impacted by Change Request	GF	$37,351,066	$0	$37,162,956	$1,046,792	$441,515
	CF	$13,734,606	$0	$13,831,821	$552,719	$227,448
	RF	$2,823,317	$0	$2,710,606	$8	$0
	FF	$74,942,284	$0	$72,854,090	$1,828,560	$668,962

Line Item Information	Fund	FY 2019-20		FY 2020-21		FY 2021-22
		Initial Appropriation	Supplemental Request	Base Request	Change Request	Continuation
	Total	$38,610,714	$0	$40,590,766	$258,142	$268,480
	FTE	500.0	0.0	504.1	4.3	4.5
01. Executive Director's Office, (A) General Administration, (1) General Administration - Personal Services	GF	$13,478,948	$0	$14,470,561	$85,187	$88,598
	CF	$3,571,232	$0	$3,714,633	$43,884	$45,642
	RF	$2,436,543	$0	$2,305,357	$0	$0
	FF	$19,123,991	$0	$20,100,215	$129,071	$134,240
	Total	$4,790,328	$0	$6,054,935	$43,448	$45,189
	FTE	0.0	0.0	0.0	0.0	0.0
01. Executive Director's Office, (A) General Administration, (1) General Administration - Health, Life, and Dental	GF	$1,700,447	$0	$2,211,097	$14,338	$14,912
	CF	$421,237	$0	$525,947	$7,386	$7,682
	RF	$126,088	$0	$138,532	$0	$0
	FF	$2,542,556	$0	$3,179,359	$21,724	$22,595

Line Item Information	Fund	FY 2019-20		FY 2020-21		FY 2021-22
		Initial Appropriation	Supplemental Request	Base Request	Change Request	Continuation
01. Executive Director's Office, (A) General Administration, (1) General Administration - Short-term Disability	Total	$66,598	$0	$72,132	$390	$407
	FTE	0.0	0.0	0.0	0.0	0.0
	GF	$24,002	$0	$26,864	$129	$134
	CF	$5,301	$0	$5,495	$66	$69
	RF	$2,206	$0	$1,639	$0	$0
	FF	$35,089	$0	$38,134	$195	$204
01. Executive Director's Office, (A) General Administration, (1) General Administration - Amortization Equalization Disbursement	Total	$1,984,802	$0	$2,182,512	$11,488	$11,948
	FTE	0.0	0.0	0.0	0.0	0.0
	GF	$722,807	$0	$812,689	$3,791	$3,943
	CF	$159,398	$0	$166,329	$1,953	$2,031
	RF	$46,310	$0	$49,606	$0	$0
	FF	$1,056,287	$0	$1,153,888	$5,744	$5,974
01. Executive Director's Office, (A) General Administration, (1) General Administration - Supplemental Amortization Equalization Disbursement	Total	$1,984,802	$0	$2,182,512	$11,488	$11,948
	FTE	0.0	0.0	0.0	0.0	0.0
	GF	$722,807	$0	$812,689	$3,791	$3,943
	CF	$159,398	$0	$166,329	$1,953	$2,031
	RF	$46,310	$0	$49,606	$0	$0
	FF	$1,056,287	$0	$1,153,888	$5,744	$5,974
01. Executive Director's Office, (A) General Administration, (1) General Administration - Operating Expenses	Total	$2,506,384	$0	$2,273,794	$26,677	$4,275
	FTE	0.0	0.0	0.0	0.0	0.0
	GF	$1,014,866	$0	$939,016	$8,803	$1,411
	CF	$243,961	$0	$197,797	$4,535	$727
	RF	$13,297	$0	$13,297	$0	$0
	FF	$1,234,260	$0	$1,123,684	$13,339	$2,137
01. Executive Director's Office, (A) General Administration, (1) General Administration - Payments to OIT	Total	$8,377,137	$0	$7,352,674	$2,501,670	$995,678
	FTE	0.0	0.0	0.0	0.0	0.0
	GF	$3,263,023	$0	$3,191,250	$825,552	$328,574
	CF	$893,637	$0	$635,619	$425,285	$169,266
	RF	$0	$0	$0	$0	$0
	FF	$4,220,477	$0	$3,525,805	$1,250,833	$497,838

| Line Item Information | Fund | FY 2019-20 | | FY 2020-21 | | FY 2021-22 |
		Initial Appropriation	Supplemental Request	Base Request	Change Request	Continuation
01. Executive Director's Office, (A) General Administration, (1) General Administration - General Professional Services and Special Projects	Total	$21,581,862	$0	$17,517,486	$75,000	$0
	FTE	0.0	0.0	0.0	0.0	0.0
	GF	$6,015,380	$0	$4,503,802	$24,750	$0
	CF	$2,615,231	$0	$2,547,721	$12,750	$0
	RF	$150,000	$0	$150,000	$0	$0
	FF	$12,801,251	$0	$10,315,963	$37,500	$0
01. Executive Director's Office, (C) Information Technology Contracts and Projects, (1) Information Technology Contracts and Projects - Colorado Benefits Management Systems, Operating & Contracts	Total	$48,948,646	$0	$48,332,662	$499,776	$0
	FTE	0.0	0.0	0.0	0.0	0.0
	GF	$10,408,786	$0	$10,194,988	$80,451	$0
	CF	$5,665,211	$0	$5,871,951	$54,907	$0
	RF	$2,563	$0	$2,569	$8	$0
	FF	$32,872,086	$0	$32,263,154	$364,410	$0

Auxiliary Data			
Requires Legislation?	NO		
Type of Request?	Department of Health Care Policy and Financing Prioritized Request	Interagency Approval or Related Schedule 13s:	Impacts Other Agency

Department of Health Care Policy and Financing

FY 2020-21 Funding Request

November 1, 2019

Jared Polis
Governor

Kim Bimestefer
Executive Director

Department Priority: R-6
Request Detail: Improve Customer Service

Summary of Incremental Funding Change for FY 2020-21			
	FY 2019-20	**FY 2020-21**	**FY 2021-22**
Total Funds	**$0**	**$3,428,079**	**$1,337,925**
FTE	0.0	4.3	4.5
General Fund	$0	$1,046,792	$441,515
Cash Funds	$0	$552,719	$227,448
Reappropriated Funds	$0	$8	$0
Federal Funds	$0	$1,828,560	$668,962

Summary of Request:

The Department requests $3,428,079 total funds, including $1,046,792 General Fund and 4.3 FTE in FY 2020-21 and $1,337,925 total funds, including $441,515 General Fund and 4.5 FTE in FY 2021-22 to improve service provided to members. The Department is committed to improving members' experience with Health First Colorado and the Child Health Plan *Plus* (CHP+). This request is the next phase of incremental improvements to provide members with adequate levels of service needed to obtain important information about their health care coverage and access their benefits. The request includes funding for increasing staffing and technology improvements in the Department's Member Contact Center (MCC) to reduce average speed to answer and decrease call abandonment rates and to contract with a vendor to make recommendations on consolidating the Department's contact points into a single phone number for all customer needs. The request also includes one-time funding to implement member surveys. The request is less than a 0.5 percent increase from the Department's FY 2019-20 Long Bill total funds appropriation.

Current Program:

The Department provides Medicaid services to 1.2 million eligible members; Health First Colorado covers more people than any single health insurance program in the state. The Department operates an internal Member Contact Center (MCC) and contracts for other customer service functions. The MCC is responsible for benefit and billing questions but also serves as the main point of contact for any inquiry related to Medicaid and CHP+ when members are not sure who to call or when they cannot get through to other partners.

In 2013, the Department made investments to improve customer service by moving from a Microsoft Access database to a cloud-based Customer Relationship Management (CRM) and Interactive Voice Response (IVR) systems. This change was needed to give the Department insight to the actual customer demand and more appropriately address and track that demand. Leveraging the new tools, the Department identified that the demand was drastically higher than estimated and requested funding to hire 25 additional staff to address rising call volumes. These staff included agents and managers to provide operational and administrative support to the MCC. These staff were approved by the General Assembly in FY 2015-16 and have helped the Department manage the increased call volume as a result of significant caseload increases due to SB 13-200, "Expand Medicaid Eligibility." Since that time, abandonment rates and hold times have been drastically reduced. In 2018, the member abandonment rate was reduced from 25 percent to 7 percent and the average speed of answer was reduced from 59 minutes to 25 minutes.

The Department's FY 2019-20 budget request R-10 "Improve Customer Experience" included funding for implementing improved technology and operations. Current work includes effective knowledge library and training to aid agents in responding more accurately and more quickly to calls, centralizing customer contact tools and resources into a single CRM (Healthy Communities consolidation) and artificial intelligence and an automated online chat to handle basic inquiries.

In addition to more call representatives, the Department has taken steps to improve the customer experience, including implementing cloud-based CRM and IVR technology which enable a single-phone number for members to call, with intelligent routing to the following community partners: Denver Health Eligibility and Enrollment Vendor, Arapahoe County, El Paso County, and the Delta County Region (which includes Archuleta, Delta, LaPlata, Ouray and San Miguel counties). These community partners are currently leveraging the Department's MCC technology instead of implementing and managing independent solutions which has led to efficiencies in reporting, better information available to agents and a more seamless customer experience. Partners that leverage the Department's technology reduce the operational workload of managing the IT systems and interfaces, take advantage of the shared knowledge and resources available to help customers and reduces the redundancy of each partner developing their own training and knowledge resources. Additionally, the partners share the same customer record logs, so all partners serving customers can view the customer contact history and provide the best service to customers.

Additional improvements in customer service that have been accomplished within existing appropriations include contracting with a temporary staffing agency to help supplement the incoming call demands. As a

result, the Department has realized a reduction in hold times. The Department also shortened the time the MCC was available to customers from 9 ½ hours to 8 ½ hours, supporting a higher density of staffing across the day. Agent performance management continues to be refined, ensuring every agent meets at least 88 percent quality assurance and 50 calls per day. Agent retention strategies allow high performing agents to earn the opportunity for flexible work place, earn a monthly gift card, and learn different and more complex skills which has led to increased retention of staff. To assist in staff retention, and in collaboration with the Department of Personnel and Administration, all agents are being reclassified from the Technician series to the Administrator series. This creates a structured career and promotion path for individuals who want to transition from the MCC into the Department's policy, program, and operational positions. Additionally, discussions continue with the Colorado Department of Human Services (CDHS) and with county offices on how customer service can be streamlined and improved across public assistance programs.

In addition to its work to improve the MCC, the Department has worked to improve the member experience by reaching out to members directly. As a result of these efforts, The Department created two Member Experience Advisory Councils (MEACs) for Medicaid and Child Health Plan *Plus* (CHP+) members to participate in; one in-person council and one virtual advisory council. The purpose of the MEACs are to engage the voices of members, their families and caregivers in making recommendations about changes in Department communications, policies, and procedures. The perspectives received through the MEACs have given the Department new information about member experience and member perspectives that are important in prioritizing work and implementing new changes and programs. The Department-facilitated Member Experience Advisory Councils (MEACs) have received national recognition and offer a direct input into how to improve the member experience. Monthly meetings with the in-person MEAC (up to 20 members) aid the Department in uncovering systemic problems that members experience and collaborating on viable solutions. Monthly surveys sent to the virtual MEAC (over 1,000 members) aid the Department in confirming the issues on a broader scale and testing the solutions. Some of the Department's partners are beginning to seek member feedback into their operations. Adams and Lake Counties are the first counties to pioneer this work to gain customer insights and input. The Regional Accountable Entities (RAEs) are also in the early stages of developing or commencing member councils.

Problem or Opportunity:

Despite the improvements made in recent years, the Department is still not providing the level of customer service that members need in order to receive timely information about their health coverage. Additional resources are needed to continue to make improvements in this area. The Department continues to struggle to answer the high volume of calls in a timely manner in its MCC because the level of staffing is not enough to handle the volume of calls received daily. The MCC continues to receive between 1,000 and 1,300 calls per day on average with agents handling up to 50 calls per day. Calls handled per agent will vary, as specific call reasons from members can range from very basic to very complex issues and agents handle multiple languages. Because of the nature of work MCC agents perform and the complexity of issues they handle along with multiple systems used makes for a stressful work environment. Handling back-to-back calls with little break times between calls can drive down agent performance and lead to attendance issues. This results in a smaller workforce to handle member calls, increased hold times for members to reach MCC agents and

an increase in abandoned calls thus increasing repeat callers to the MCC. In comparison, the Departments contracted provider call center's agents average 25 calls handled per day which falls more in line with similar call centers in the health care industry.

County offices have reported varying average hold times for their customer service centers, ranging from 30 minutes to over 2 hours. The Department has attempted to augment current staffing with temporary employees using existing funding, but this solution is not financially sustainable within the current budget and is only serving as a short-term stopgap to improve customer service. Being consistently understaffed has led to difficult working conditions in the MCC making it harder to attract and retain staff in Denver's competitive labor market. When members cannot get through to obtain information about their health coverage, it can lead to escalated health situations which may require emergency care or lead to adverse health outcomes and increased costs.

The MCC receives calls for all aspects of the Department's programs and ends up routing this information to the appropriate party, leading to increased call volumes and hold times. There are many reasons customers reach out to the MCC, mostly requesting assistance with touchpoints that are inefficient or cause confusion. Approximately 40% of incoming calls are related to eligibility issues and updates which require transfers to the appropriate county. Additionally, calls are received for public assistance programs overseen by Colorado Department of Human Services (CDHS) and administered by county offices. Customers frequently reach the MCC stating they are unable to get through to their county or are having trouble making updates in the Program Eligibility Application Kit (PEAK), the self-service portal for public assistance programs.

Looking up this information for members is too time consuming because there are many other systems that do not interface with the CRM. This requires agents to become trained on all these systems and to log into other systems, requiring members to wait on hold while information is obtained. In addition to the CRM software, agents are required to collect and utilize information from different and unique systems for each of the following types of information:

1. Home and Community-Based Services (HCBS) prior authorizations
2. Pharmacy billing and prior authorizations
3. Drug formulary and provider fee schedules
4. Medical prior authorizations
5. Medical billing
6. Dental enrollment and prior authorizations
7. Member premiums and co-pays
8. Eligibility information, history and, changes

Taken together, these factors show that further investments in customer services are still needed in order to ensure that members can receive timely information.

Proposed Solution:

The Department requests $3,428,079 total funds, including $1,046,792 General Fund and 4.3 FTE in FY 2020-21 and $1,337,925 total funds, including $441,515 General Fund and 4.5 FTE in FY 2021-22 to improve service provided to members in order to answer their inquiries timelier and more efficiently. The request links to member health and customer service goals in the Department's performance plans. When members can get the information they need timely about their health coverage, they can better access services they need for prevention and management of chronic health conditions.

The request includes funding to hire 4.5 FTE for two years in its MCC, and funding for technology necessary to support the increased staffing. The request also includes additional technology innovations to improve the wait and call times, including integrating systems that members frequently call about into the customer relationship management (CRM) system that agents use so that they can more quickly and accurately obtain information needed at point of call, additional functionality for artificial intelligence and automated chat to reduce call volume, and implementing online member surveys through the Program Eligibility Application Kit (PEAK) to better understand member experiences with the online tools. Additionally, the request includes one-time contractor funding to study customer service improvements.

Member Contact Center Staffing
To achieve a better response time for customers, the Department requests funding to hire 4.5 FTE in the MCC for FY 2020-21 and FY 2021-22. This includes 2.5 agents, one lead, and one quality assurance reviewer. The staff request is time limited because it will take time for the technology improvements to impact call statistics. The Department would continue to monitor call volumes and average speed to answer and utilize the budget process to request any changes in staffing needs ongoing. This funding would expire after FY 2021-22; the Department would evaluate the success of the additional resources during this period and, if necessary, use the budget process to request further resources for FY 2022-23.

Technology
Workload management software
The Department requests funding to procure workload management software for the MCC. Currently the MCC manually assesses hourly demand and schedules staff using Excel spreadsheets and calculations. Workload management software would enable the MCC to better to meet customer demand in a satisfactory timeframe. Workload management software is used by larger and private industry contact centers and integrates the data to forecast workload and provide insights at the day of the month, day of the week, time of day down to the hourly and half-hourly call demand. It includes the call demand as well as the average handle times, providing a daily and hourly schedule to assist the MCC in meeting customer needs. Scheduling functionality in addition to increasing staffing would better equip the MCC to achieve service-level goals because it increases the chances that agents are available to handle incoming calls.

CRM System Integration
To improve the speed with which agents can answer questions, the Department requests funding to integrate and interface important and more common issues data into the CRM, thus reducing the number of systems and logins that an agent must use. The Department intends to start with the systems that members most

frequently call about, the interChange, the Department's claims system, and the system used by providers and the Department's utilization vendor for Prior Authorization Requests (PARs).

<u>Artificial Intelligence and Automated Chat</u>

The Department requests funding to continue improvements to artificial intelligence and automated chat processes already under way. Phase 1 of the Artificial Intelligence and Automated Chat (AI/AC) initiative, which was approved in the FY 2019-20 R-10 "Transform Customer Experience" request, will include setting up the basic infrastructure on the Department's customer websites and implementing some basics such as offering general benefit information and ordering medical ID cards. General benefit information can be programmed from the Member Handbooks and other resources available on the websites. Phase 2 of the AI/AC initiative would include services that need greater authentication and querying such as verifying eligibility/coverage for a member's date of service, sending a provider notification letter, and explaining eligibility letters.

<u>Surveys</u>

The Department requests funding for a member survey tool and results would help identify issues and prioritize solutions. Over 1,000 individuals participate in Department-issued customer surveys to improve different aspects of the customer experience through the Departments virtual MEAC. Direct customer input has proven invaluable in making impactful changes. The Department is requesting funding to implement an online survey tool through Salesforce Marketing Cloud and the MCC that can be used by the virtual MEAC as well as by the MCC, to continually monitor issues and target areas for improvements. Currently the MCC does not have a feedback tool for calls or chats and the MEAC uses the general Survey Monkey account with the Department. Placing a more robust survey tool that crosses both the MEAC and the MCC would allow the Department to better record individual customer experiences, tying the results to certain parts of the customer process and to the customer record.

Other Member Initiatives

<u>Single Phone Number</u>

The Department requests one-time funding to contract with a vendor to provide recommendations on how the number of contact points for members could be streamlined, with the goal to get to a single phone number that members would call for any needs which would route calls to the appropriate party. Although the Department has done some research within existing resources, dedicated funding is needed to further study the issue and make recommendations to inform future budget requests. The Department proposes to start with streamlining across all its contact points but is interested in the future in looking across all public assistance programs in Colorado, to make gaining information about public benefits more user friendly for Coloradans.

Anticipated Outcomes:

Increasing staffing and improving technology would support the Department in its MCC service goals of improving average speed to answer. Although the level of staffing requested would likely not be enough to reduce average speed to answer, along with other initiatives requested and currently underway, the

Department anticipates that customers would begin to receive improved level of service. Increased staffing would also allow for agents to have a more stable working environment, allowing time off the phones for needed training and one on one meetings with managers without impacting call center performance because coverage would be available. The Department would continue to monitor call volume and key call metrics to measure the outcome of the additional staffing and technology improvements.

Assumptions and Calculations:

Detailed calculations and a timeline can be found in Appendix A and B. The Department assumes administrative costs would be eligible for 50 percent Federal Financial Participation (FFP) and would be requested in the federally required Public Assistance Cost Allocation Plan (PACAP). The Salesforce Marketing Cloud system costs would be eligible for 75 percent enhanced FFP by submitting an Advanced Planning Document (APD) for federal approval of enhanced funding. If federal approval is not received, the Department would utilize the budget process to request any changes in funding. The Department assumes the state share of administrative costs would be allocated between General Fund and Healthcare Affordability and Sustainability Fee Cash Fund based on caseload.

MCC Staffing

The Department assumes FTE would be hired July 1, 2020 and would be trained to begin taking calls by September 1, 2020.

Technology

The Department assumes it would enter into an interagency agreement for system integration with the Office of Information Technology (OIT) for the CRM integration and AI/AC for the MCC. The funding for the Salesforce Marketing Cloud changes would be added to the Department's contract with OIT and Deloitte. The system development estimates were provided by OIT and the work would begin July 1, 2020 and would be completed by June 30, 2021 with ongoing funding needed for continued operations and improvements.

Other Member Initiatives

The Department assumes a competitive solicitation would not be required and that it could contract with a vendor by September 1, 2020 for the study on streamlining customer service phone numbers.

Appendix A: FTE Descriptions

Title	FTE	Duties
Contact Center Agent	2.5	Position would serve traditional role of answering inbound calls, chats, callbacks to improve average speed to answer and reduce abandonment rate.
Contact Center Lead	1	The position exists to serve as a resource to agents; providing direction, guidance, information and coaching when needed. This position is responsible for ensuring established work procedures at a fully operational level and serves as a Subject Matter Expert for agents within the Member Contact Center (MCC). Position would work skillfully in multiple system applications, policies, procedures, practices, and methods in order to resolve consumer inquiries. Position would also assist agents to help members navigate a complex health care environment by telephone, in person, internet chat, fax, e-mail or through written correspondence. This incorporates customers applying for or participating in the State Medicaid program, Colorado Indigent Care Program, and coordinating programs such as Medicare, CHP+, Connect for Health, etc. Job duties would also include researching complex member inquiries and assisting with proper resolution, Interpreting and applying program policies, procedures, and established standard guidelines to assist the member and provider. Job duties also include advising, counselling, and directing agents towards community resources and health care options for the uninsured. The position would also be responsible for identifying possible policy changes and make suggestions to management.
Quality Assurance Analyst	1	Position exists to monitor quality assurance (Q&A) of representatives and agents of the MCC. The Q&A reviews are completed on an individual level, with the purpose of providing regular performance feedback to the MCC managers and the QA and Training Lead to identify error trends which will be used to inform the training platform, agent development and center performance. Position partners with team supervisor and leads to develop and ensure agents meet Department key performance indicators (KPIs). Position monitors recorded and/or live calls for consistency in adherence to Department guidelines and provide direct feedback to representatives regarding call quality strengths and weaknesses. Position must possess a strong working knowledge of standard call center operations, quality monitoring and feedback and training development for the purpose of creating long term effective and improved performance within the MCC. Management seeks the recommendations of this position based on the findings of the quality review data.

	**Table 1.1 FY 2020-21 R-6 Improve Customer Service Summary by Line Item**							

Row	Line Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	Notes/Calculations
A	(1) Executive Director's Office, (A) General Administration, Personal Services	$258,142	4.3	$85,187	$43,884	$0	$129,071	Table 2.1 Row B
B	(1) Executive Director's Office, (A) General Administration, Health, Life and Dental	$43,448	0.0	$14,338	$7,386	$0	$21,724	Table 6.1 Row B
C	(1) Executive Director's Office, (A) General Administration, Short-term Disability	$390	0.0	$129	$66	$0	$195	Table 6.1 Row C
D	(1) Executive Director's Office, (A) General Administration, SB 04-257 Amortization Equalization Disbursement	$11,488	0.0	$3,791	$1,953	$0	$5,744	Table 6.1 Row D
E	(1) Executive Director's Office, (A) General Administration, SB 06-235 Supplemental Amortization Equalization Disbursement	$11,488	0.0	$3,791	$1,953	$0	$5,744	Table 6.1 Row E
F	(1) Executive Director's Office, (A) General Administration, Operating Expenses	$26,677	0.0	$8,803	$4,535	$0	$13,339	Table 6.1 Row F
G	(1) Executive Director's Office, (A) General Administration, Payments to OIT	$2,501,670	0.0	$825,552	$425,285	$0	$1,250,833	Table 2.1 (Row F + G + Row H)
H	(1) Executive Director's Office, (A) General Administration, General Professional Services and Special Projects	$75,000	0.0	$24,750	$12,750	$0	$37,500	Table 2.1 Row K
I	(1) Executive Director's Office, (C) Information Technology Contracts and Projects, Colorado Benefits Management Systems, Operating and Contract Expenses	$499,776	0.0	$80,451	$54,907	$8	$364,410	Table 2.1 Row I
J	**Total Request**	**$3,428,079**	**4.3**	**$1,046,792**	**$552,719**	**$8**	**$1,828,560**	Sum of Rows A thru I

**Table 1.2 FY 2021-22 R-6 Improve Customer Service Summary by Line Item**

Row	Line Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	Notes/Calculations
A	(1) Executive Director's Office, (A) General Administration, Personal Services	$268,480	4.5	$88,598	$45,642	$0	$134,240	Table 2.2 Row B
B	(1) Executive Director's Office, (A) General Administration, Health, Life and Dental	$45,189	0.0	$14,912	$7,682	$0	$22,595	Table 6.2 Row B
C	(1) Executive Director's Office, (A) General Administration, Short-term Disability	$407	0.0	$134	$69	$0	$204	Table 6.2 Row C
D	(1) Executive Director's Office, (A) General Administration, SB 04-257 Amortization Equalization Disbursement	$11,948	0.0	$3,943	$2,031	$0	$5,974	Table 6.2 Row D
E	(1) Executive Director's Office, (A) General Administration, SB 06-235 Supplemental Amortization Equalization Disbursement	$11,948	0.0	$3,943	$2,031	$0	$5,974	Table 6.2 Row E
F	(1) Executive Director's Office, (A) General Administration, Operating Expenses	$4,275	0.0	$1,411	$727	$0	$2,137	Table 6.2 Row F
G	(1) Executive Director's Office, (A) General Administration, Payments to OIT	$995,678	0.0	$328,574	$169,266	$0	$497,838	Table 2.2 (Row F+ Row G + Row H)
H	(1) Executive Director's Office, (A) General Administration, General Professional Services and Special Projects	$0	0.0	$0	$0	$0	$0	Table 2.2 Row K
I	(1) Executive Director's Office, (C) Information Technology Contracts and Projects, Colorado Benefits Management Systems, Operating and Contract Expenses	$0	0.0	$0	$0	$0	$0	Table 2.2 Row I
J	**Total Request**	**$1,337,925**	**4.5**	**$441,515**	**$227,448**	**$0**	**$668,962**	Sum of Rows A thru I

**Table 1.3 FY 2022-23 R-6 Improve Customer Service Summary by Line Item**							
Row	Line Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	Notes/Calculations
A	(1) Executive Director's Office, (A) General Administration, Personal Services	$0	0.0	$0	$0	$0	$0	Two year time limited
B	(1) Executive Director's Office, (A) General Administration, Health, Life and Dental	$0	0.0	$0	$0	$0	$0	Two year time limited
C	(1) Executive Director's Office, (A) General Administration, Short-term Disability	$0	0.0	$0	$0	$0	$0	Two year time limited
D	(1) Executive Director's Office, (A) General Administration, SB 04-257 Amortization Equalization Disbursement	$0	0.0	$0	$0	$0	$0	Two year time limited
E	(1) Executive Director's Office, (A) General Administration, SB 06-235 Supplemental Amortization Equalization Disbursement	$0	0.0	$0	$0	$0	$0	Two year time limited
F	(1) Executive Director's Office, (A) General Administration, Operating Expenses	$0	0.0	$0	$0	$0	$0	Two year time limited
G	(1) Executive Director's Office, (A) General Administration, Payments to OIT	$726,348	0.0	$239,695	$123,480	$0	$363,173	Table 2.3 (Row F + Row G + Row H)
H	(1) Executive Director's Office, (A) General Administration, General Professional Services and Special Projects	$0	0.0	$0	$0	$0	$0	Table 2.3 (Row K)
I	(1) Executive Director's Office, (C) Information Technology Contracts and Projects, Colorado Benefits Management Systems, Operating and Contract Expenses	$0	0.0	$0	$0	$0	$0	Table 2.3 Row I
J	**Total Request**	**$726,348**	**0.0**	**$239,695**	**$123,480**	**$0**	**$363,173**	Sum of Rows A thru I

	Table 2.1 FY 2020-21 R-6 Improve Customer Service Summary by Initiative							
Row	**Item**	**Total Funds**	**FTE**	**General Fund**	**Cash Funds**	**Reappropriated Funds**	**Federal Funds**	**FFP**	**Notes/Calculations**
A	*Contact Center Staffing- Total Request*	**$351,633**	**4.3**	**$116,039**	**$59,777**	**$0**	**$175,817**	50%	Row B + Row C + Row D
B	New FTE-Personal Services,Salary, PERA and Medicare	$258,142	4.3	$85,187	$43,884	$0	$129,071	50%	Table 6.1 Row A
C	New FTE- HLD, STD, AED, SAED	$66,814	0.0	$22,049	$11,358	$0	$33,407	50%	Table 6.1 Row B through E
D	New FTE- Operating Expenses	$26,677	0.0	$8,803	$4,535	$0	$13,339	50%	Table 6.1 Row F
E	*OIT Funds for Technology Improvements- Total Request*	**$3,001,446**	**0.0**	**$906,003**	**$480,192**	**$8**	**$1,615,243**	Various	Row F + Row G + Row H + Row I
F	OIT-Call Center Technology	$245,870	0.0	$81,137	$41,798	$0	$122,935	50%	Table 7.1 Row O
G	Include Member Data In CRM	$899,250	0.0	$296,753	$152,873	$0	$449,624	50%	Table 3.1 Row I
H	Expand Artificial Intelligence- Chatbot	$1,356,550	0.0	$447,662	$230,614	$0	$678,274	50%	Table 4.1 Row J
I	Member Surveys	$499,776	0.0	$80,451	$54,907	$8	$364,410	75%	Table 5.1 Row F
J	*Other Member Improvements - Total Request*	**$75,000**	**0.0**	**$24,750**	**$12,750**	**$0**	**$37,500**	NA	Row K
K	Contract to Study Streamlining Customer Service Phone Numbers	$75,000	0.0	$24,750	$12,750	$0	$37,500	50%	Department Estimate for a contractor to prepare a report
L	Total Request	$3,428,079	4.3	$1,046,792	$552,719	$8	$1,828,560	NA	Row A + Row E + Row J

Table 2.2 FY 2021-22 R-6 Improve Customer Service Summary by Initiative

Row	Item	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	FFP	Notes/Calculations
A	*Contact Center Staffing- Total Request*	**$342,247**	**4.5**	**$112,941**	**$58,182**	**$0**	**$171,124**	**50%**	Row B + Row C + Row D
B	FTE-Personal Services,Salary, PERA and Medicare	$268,480	4.5	$88,598	$45,642	$0	$134,240	50%	Table 6.2 Row A
C	FTE- HLD, STD, AED, SAED	$69,492	0.0	$22,932	$11,813	$0	$34,747	50%	Table 6.2 Row B through E
D	FTE- Operating Expenses	$4,275	0.0	$1,411	$727	$0	$2,137	50%	Table 6.2 Row F
E	*OIT Funds for Technology Improvements- Total Request*	**$995,678**	**0.0**	**$328,574**	**$169,266**	**$0**	**$497,838**	Various	Row F + Row G + Row H + Row I
F	OIT-Call Center Technology for New FTE	$257,103	0.0	$84,844	$43,708	$0	$128,551	50%	Table 7.1 Row O
G	Include Member Data In CRM	$349,125	0.0	$115,211	$59,351	$0	$174,563	50%	Table 3.1 Row I
H	Expand Artificial Intelligence- Chatbot	$389,450	0.0	$128,519	$66,207	$0	$194,724	50%	Table 4.1 Row J
I	Member Surveys	$0	0.0	$0	$0	$0	$0	75%	Table 5.1 Row F
J	*Other Member Improvements - Total Request*	**$0**	**0.0**	**$0**	**$0**	**$0**	**$0**	NA	Row K
K	Contract to Study Streamlining Customer Service Phone Numbers	$0	0.0	$0	$0	$0	$0	50%	One time funding
L	**Total Request**	**$1,337,925**	**4.5**	**$441,515**	**$227,448**	**$0**	**$668,962**	50%	Row A + Row E + Row J

Table 2.3 FY 2022-23 R-6 Improve Customer Service Summary by Initiative									
Row	**Item**	**Total Funds**	**FTE**	**General Fund**	**Cash Funds**	**Reappropriated Funds**	**Federal Funds**	**FFP**	**Notes/Calculations**
A	*Contact Center Staffing- Total Request*	**$0**	**0.0**	**$0**	**$0**	**$0**	**$0**	**50%**	Row B + Row C + Row D
B	FTE-Personal Services,Salary, PERA and Medicare	$0	0.0	$0	$0	$0	$0	50%	Staff are two year time limited
C	FTE- HLD, STD, AED, SAED	$0	0.0	$0	$0	$0	$0	50%	Staff are two year time limited
D	FTE- Operating Expenses	$0	0.0	$0	$0	$0	$0	50%	Staff are two year time limited
E	*OIT Funds for Technology Improvements- Total Request*	**$726,348**	**0.0**	**$239,695**	**$123,480**		**$0**	**$363,173**	Various	Row F + Row G + Row H + Row I
F	OIT-Call Center Technology for New FTE	$257,103	0.0	$84,844	$43,708		$0	$128,551	50%	Table 7.1 Row O
G	Include Member Data In CRM	$221,175	0.0	$72,988	$37,600		$0	$110,587	50%	Table 3.1 Row I
H	Expand Artificial Intelligence- Chatbot	$248,070	0.0	$81,863	$42,172		$0	$124,035	50%	Table 4.1 Row J
I	Member Surveys	$0	0.0	$0	$0		$0	$0	75%	Table 5.1 Row F
J	*Other Member Improvements - Total Request*	**$0**	**0.0**	**$0**	**$0**	**$0**	**$0**		NA	Row K
K	Contract to Study Streamlining Customer Service Phone Numbers	$0	0.0	$0	$0	$0	$0		50%	One-time funding
L	Total Request	**$726,348**	**0.0**	**$239,695**	**$123,480**	**$0**	**$363,173**		50%	Row A + Row E + Row J

	Table 3.1 Customer Relationship Management (CRM) Development Costs				
Row	Item	FY 2020-21	FY 2021-22	Ongoing	Comments
A	Project Management	$117,000	$117,000	$0	Estimate from OIT
B	Business Analyst/User Acceptance	$110,250	$27,563	$16,538	Estimate from OIT
C	User Interface (UI)/User Experience	$36,750	$0	$0	Estimate from OIT
D	Quality Assurance (QA)	$36,750	$9,188	$5,513	Estimate from OIT
E	SalesForce Developers	$150,000	$0	$37,500	Estimate from OIT- develop salesforce and support on the API side
F	Integrations Developer	$337,500	$84,375	$50,625	Estimate from OIT
G	Mulesoft Production Cores	$54,000	$54,000	$54,000	Cores split between Data in CRM and AI Phase 2
H	Mulesoft Non-Prod Cores	$57,000	$57,000	$57,000	Cores split between Data in CRM and AI Phase 2
I	**Total Request**	**$899,250**	**$349,125**	**$221,175**	Sum of Rows A through H

Row	Item	FY 2020-21	FY 2021-22	Ongoing	Comment
**Table 4.1 Artificial Intelligence Development Costs**
A	Project Management	$117,000	$117,000	$0	Estimate from OIT
B	Business Analyst/User Acceptance Testing (UAT)	$36,750	$9,188	$5,513	Estimate from OIT
C	User Interface (UI)/User Experience (UX) Analyst	$36,750	$0	$0	Estimate from OIT
D	Quality Assurance (QA)	$22,050	$5,513	$3,308	Estimate from OIT
E	SalesForce Developers	$285,000	$0	$47,500	Estimate from OIT. Adding the Chat Bot text to the Salesforce App
F	Integrations Developer	$135,000	$33,750	$20,250	Estimate from OIT
G	Artificial Intelligence (AI)	$650,000	$150,000	$97,500	Estimate from OIT. Vendor development
H	Mulesoft Production Cores	$36,000	$36,000	$36,000	Estimate from OIT. Cores split between this and Data in CRM Tab
I	Mulesoft Non-Prod Cores	$38,000	$38,000	$38,000	Estimate from OIT. Cores split between this and Data in CRM Tab
J	**Total Request**	**$1,356,550**	**$389,450**	**$248,070**	**Sum of Rows A through I**

R-6 Improve Customer Service
Appendix B: Calculations and Assumptions

	Table 5.1 Member Survey Development costs				
Row	**Label**	**Hours**	**Rate**	**Cost**	**Source/Calcuation**
A	Business Requirements	232	$134	$31,088	Estimate from OIT
B	Design	391	$134	$52,394	Estimate from OIT
C	Development	1,881	$134	$252,054	Estimate from OIT
D	System Integration Testing	610	$134	$81,740	Estimate from OIT
E	Customer Experience Measurement Pilot	616	$134	$82,500	Estimate from OIT
F	**Total Request**	**3,730**	**NA**	**$499,776**	Row A + Row B + Row C + Row D + Row E

Row	Line Item	Total Funds	FTE	General Fund	Healthcare Affordability and Sustainability Fee Cash Fund	Reappropriated Funds	Federal Funds
**Table 6.1 FTE Costs- Member Contact Center FY 2020-21**						
A	Personal Services	$258,142	4.3	$85,187	$43,884	$0	$129,071
B	Health, Life and Dental	$43,448	0.0	$14,338	$7,386	$0	$21,724
C	Short-term Disability	$390	0.0	$129	$66	$0	$195
D	SB 04-257 Amortization Equalization Disbursement	$11,488	0.0	$3,791	$1,953	$0	$5,744
E	SB 06-235 Supplemental Amortization Equalization Disbursement	$11,488	0.0	$3,791	$1,953	$0	$5,744
F	Operating Expenses- includes additional headsets and monitors	$26,677	0.0	$8,803	$4,535	$0	$13,339
G	Total	$351,633	4.3	$116,039	$59,777	$0	$175,817

Row	Line Item	Total Funds	FTE	General Fund	Healthcare Affordability and Sustainability Fee Cash Fund	Reappropriated Funds	Federal Funds
**Table 6.2 FTE Costs- Member Contact Center FY 2021-22 and ongoing**						
A	Personal Services	$268,480	4.5	$88,598	$45,642	$0	$134,240
B	Health, Life and Dental	$45,189	0.0	$14,912	$7,682	$0	$22,595
C	Short-term Disability	$407	0.0	$134	$69	$0	$204
D	SB 04-257 Amortization Equalization Disbursement	$11,948	0.0	$3,943	$2,031	$0	$5,974
E	SB 06-235 Supplemental Amortization Equalization Disbursement	$11,948	0.0	$3,943	$2,031	$0	$5,974
F	Operating Expenses	$4,275	0.0	$1,411	$727	$0	$2,137
G	Total	$342,247	4.5	$112,941	$58,182	$0	$171,124

Row	Label	FY 2020-21	FY 2021-22	FY 2022-23	Source/Calculation
center **Table 7.1 Technology for Member Contact Center**					
A	Number of Customer Relationship Management (CRM) Licenses	4.5	4.5	4.5	FTE Count
B	Cost Per License	$1,564	$1,564	$1,564	Estimate from Office of Information Technology (OIT)
C	**Estimated Cost- CRM**	**$7,037**	**$7,037**	**$7,037**	Row A * Row B
D	Number of Interactive Voice Response (IVR) licenses	4.5	4.5	4.5	FTE Count
E	Cost Per License	$2,388	$2,388	$2,388	Estimate from OIT
F	Workforce Management (WFM)	$432	$432	$432	Estimate from OIT
G	Dashboard	$330	$330	$330	Estimate from OIT
H	**Estimated Cost- IVR**	**$14,175**	**$14,175**	**$14,175**	Row D * (Row E + Row F + Row G)
I	**Estimated Cost- Increased Minutes**	**$224,658**	**$235,891**	**$235,891**	Estimate from OIT
O	**Total Request**	**$245,870**	**$257,103**	**$257,103**	Row C + Row H + Row I

PROJECT TIMELINE

	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22
FTE Start Date	■																						
OIT MCC System Development Begins	■	■	■	■	■	■																	
System Development-Member Surveys	■	■	■	■	■	■	■	■	■	■	■	■											
Include Member Data In CRM							■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Expand Artificial Intelligence							■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■