

Service Delivery Modernization Update

Business Innovation and Implementation Branch

OMSSA 2019

December, 2019

Initiative Updates

- Electronic Document Management (EDM) ODSP & OW
- MyBenefits

EDM at a Glance

Client documents from paper and electronic sources integrated into a scalable, enterprise storage solution which is seamlessly accessible through SAMS.

Features

- Paper is digitized, securely stored, and retrievable in SAMS in **real-time**
- Quick access to case information, allowing for **improved client service**
- Digital Mailroom **reduces administrative burden**
- **No more mailrooms, file rooms, and physical archiving**
- **Scalable solution** across benefits programs
- **Improved records management**, destruction of hardcopy materials and legally retaining in a digital format



*"Life in the office is so much easier, coverage is also easier...
Life for clients is easier and organizing our days is easier."*

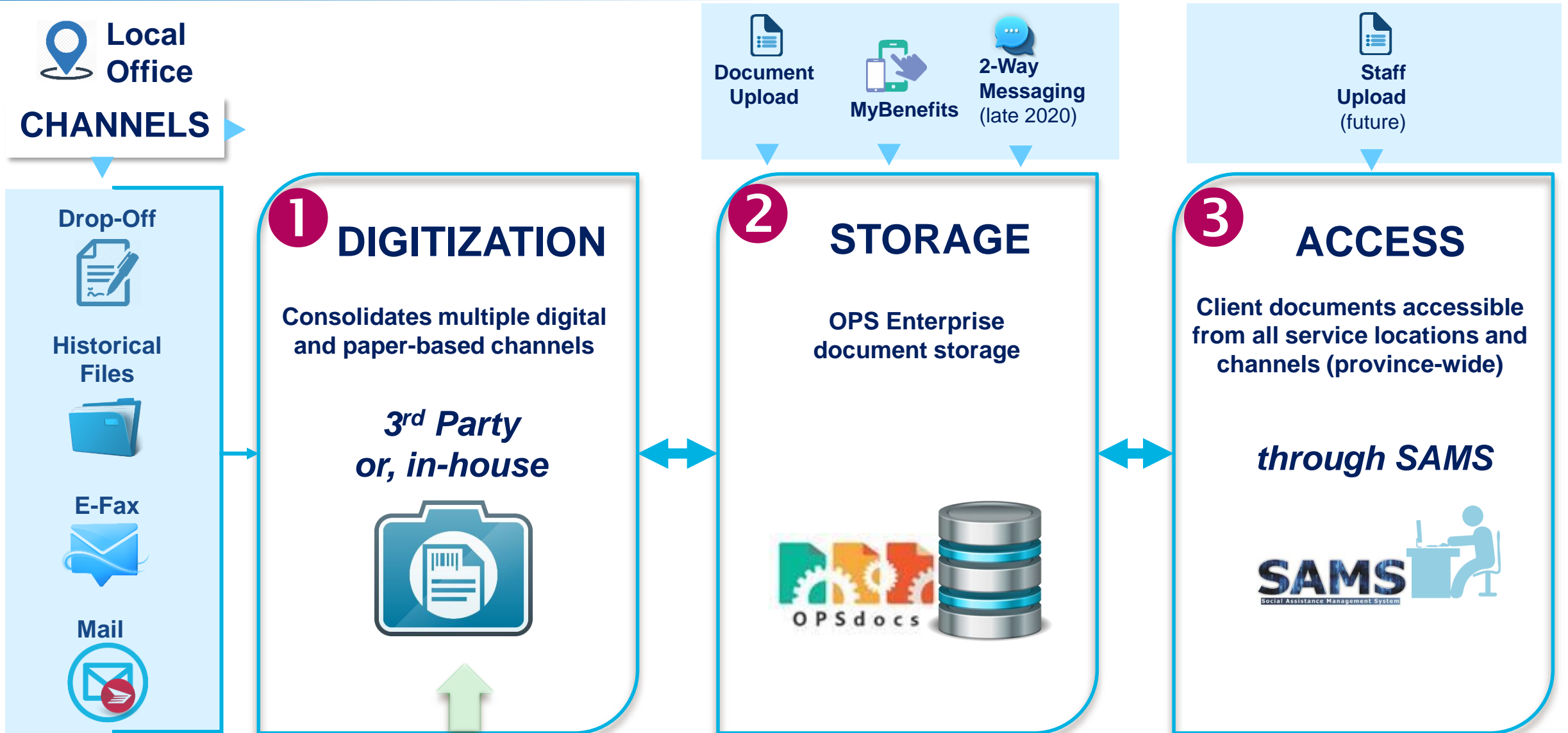
- Caseworker, Barrie ODSP Office

The ODSP Opportunity

- ODSP **processes ~35,000 new pieces of paper daily**
- 340 ODSP staff spend **28% of time** on document management
- Future expansion into all ODSP and Ontario Works Offices



EDM Foundation - Overview



EDM - OW Implementation Options

Municipality engages with the existing MCSS Digitization provider: Nimble Technologies.

TESS Solution 

Municipality manages their own digitization service, following existing standards.

Municipality engages with a different Digitization provider. Data is delivered to Ministry via the Municipality

1

2

3

Municipal
DIGITIZATION
Service

DIGITIZATION
via other 3rd
Party

Common Standards

STORAGE



ACCESS



MyBenefits

EDM-OW Common Standards

Supporting Provincial and Municipality requirements

Addressing operational, scalability and maintainability considerations.

Providing consistency for records management, file transfers and caseworkers working with client files from multiple jurisdictions

Regardless of the Implementation Option, all Municipalities will follow Common Standards, such as:

- ✓ Files: format; encryption method; volumes; delivery times; delivery method
- ✓ Documents: size; image resolution
- ✓ Data: meta-data; folder structure including identification of document types; Member ID validation

Records Management:

- ✓ Adoption of a consistent approach for digitized document retention schedules is preferred.
- ✓ The solution is designed to accommodate some variance where required for each Municipality.

Next Steps

Now that the TESS Pilot program is well underway, BIIB are actively engaging with Municipalities to plan for participation in EDM.



MCCSS

- Finalize ODSP Digital Record Series as a baseline for Municipalities to consider
- Provide an informational document for municipalities as an overview of the EDM-OW solution
- Publish Common Standards with important technical details

Municipalities

- Contact us to open discussions as you are considering implementation options and timing factors:
 - Greg.Walden2@ontario.ca & cc OW.EDMSupport@ontario.ca

Timelines

TESS Pilot

Q3 FY19/20

- Start OW/TESS Digital Mailroom Pilots

Q4 FY19/20

- Continued TESS roll-out
- Evaluate results OW/TESS Pilots

Q1 FY20/21

- Continued TESS roll-out through end of 2020

MCCSS Preparation

- OW Playbook and Common Standards

- Onboarding planning based on results of Assessments
- EDM OW Roll-Out Strategy

- Phase 1 EDM-OW Roll-out activities with Phase 1 Municipalities

Municipality Engagement

- Expression of Interest from Municipalities
- Begin Readiness Assessments with identified (Phase 1) Municipalities

- Continue Readiness Assessments with identified (Phase 1) Municipalities

- EDM OW adoption activities for Phase 1 Municipalities
- Continue Readiness Assessments with additional (Phase 2) Municipalities

EDM OW

TESS Update



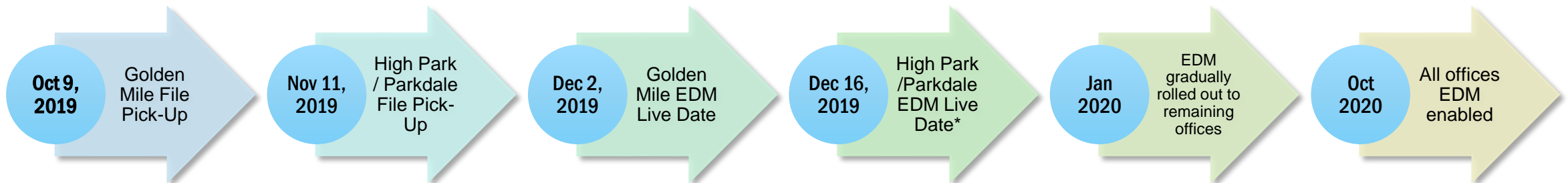
Contacts: **Robert Laws**
Robert.Laws@toronto.ca
416-397-5520

EDM Pilot Sites/Roll Out (OW)

- Active files from first TESS pilot site (Golden Mile & High Park / Parkdale) have been picked up by vendor and file digitization has begun
- Golden Mile to become EDM enabled as of December 2nd
- Second pilot site (High Park/Parkdale) file pick-up scheduled to take place during the week of November 11
- High Park /Parkdale to become EDM enabled as of December 16th



Commencing January 2020, each remaining office will have their files digitized as per a pre-established schedule, with all offices expected to be EDM enabled by October 2020



EDM Site Readiness (OW)

Site Readiness Checklist

- ☐ Files in TESS offices are reconciled prior to pick up date

Reconciliation consists of:

- File separation (ensure active files are separated from inactive files)
- Outstanding document filing
- Inactive file purging

- ☐ Offices provided with an Implementation Checklist

- ☐ Completion of site visit by vendor prior to file pick-up



TESS is creating a guideline/template using learnings from pilot offices, to be used for remaining offices as they implement EDM

EDM Solutions Demo

Accessing Work in a Digital Workspace

- Main EDM Document Inbox
- Searching, Viewing, Forwarding & Downloading Documents
- Adjusting Values Assigned to a Document
- MyBenefits Connection

Responding to Inquiries and Reviewing Records

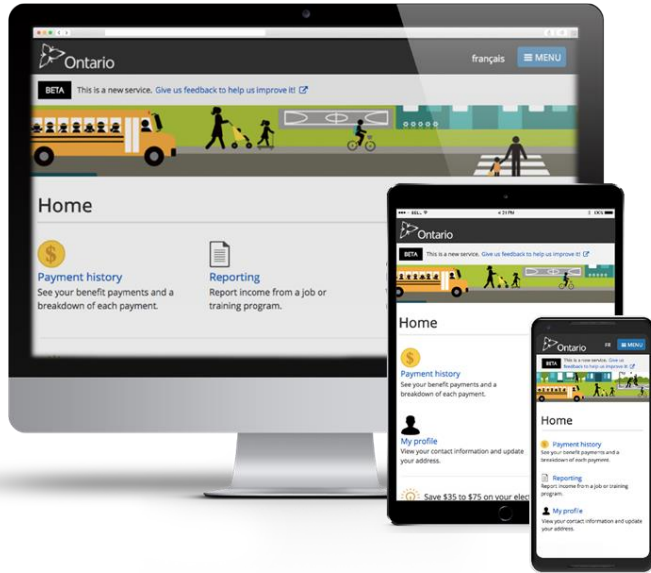
- Documents in the Person Page & Integrated Case

MyBenefits

Overview and Video

MyBenefits VIDEO

MyBenefits Overview



- **Fast, easy** and **secure** way for people to access case info and report changes + **saves staff time**
- **Accessible** anytime, anywhere and **on any device** (smartphone, tablet, computer)
- Developed & iterated using **Agile, User-Centered** approach, co-designed & tested with real users.
- Follows Ontario's **Digital Service Standard**, and **Ontario.ca** Design Guidelines.

Current Features

- View **payments, overpayments, letters & profile information**
- **Report** on **earnings** from a job/training program, **address & phone number** changes
- Enterprise **Login – Public Secure**

Upcoming Features

- 2-way **messaging** between clients & staff
- **Upload document**
- Report housing expenses

The Opportunity

- **30%** of clients use a mobile device to access the SA website
- **67%** of Canadian households in the lowest income bracket have cell phones, and **60%** have internet access at home
- **Example of potential savings: ~\$6M** spent in 18-19 for producing client letters. Could be saved with a digital-by-default approach (letters delivered via MyBenefits, instead of paper/mail-out)
- **Scalable solution** capable of integrating additional services to give Ontarians a **consistent, single-window experience**

MyBenefits Current Uptake

Ontario Works

Chatham Kent – **19.62%**

Halton Region – **11.39%**

Leeds & Grenville – **13.66%**

Top Performers

ODSP:

St. Catharines – **3.82%**

Barrie – **3.76%**

Bracebridge – **3.72%**

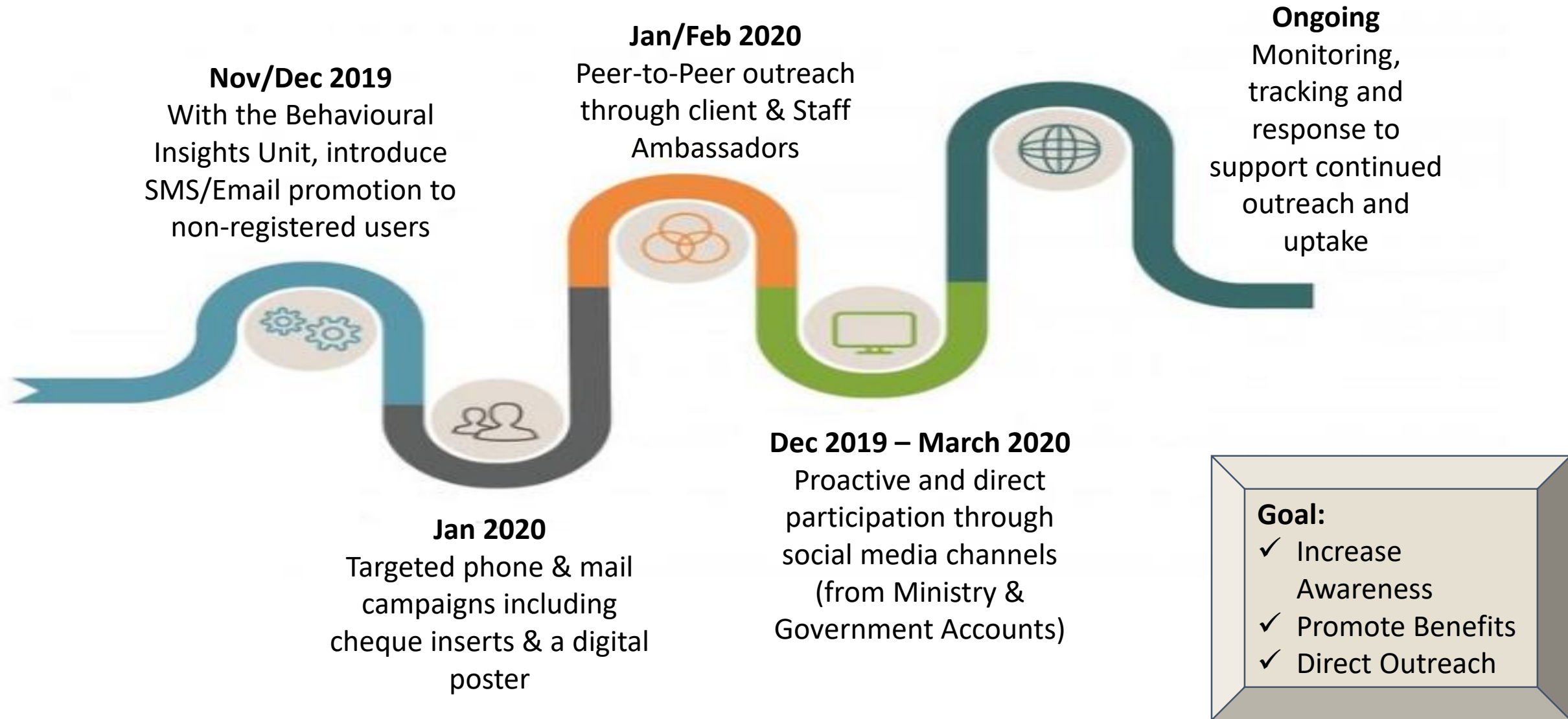
% = total caseload regardless of eligibility

15,660

Registered users
(Nov 15, 2019)



MyBenefits Future Uptake





Future Features

- ▶ Two-way messaging (like email)
- ▶ Report housing expenses (shelter & utilities) and track status of reports
- ▶ Document upload
- ▶ Trustee access
- ▶ View employment information and report employment changes
- ▶ Report other types of income + track status
- ▶ Report other types of expenses (e.g. child care and employment) + track status
- ▶ Apply for benefits available under OW and ODSP
- ▶ Make direct deposit changes
- ▶ Set up pay direct (e.g. for landlord or utility)
- ▶ Edit email
- ▶ See program status/provide proof of eligibility to third parties
- ▶ Add/remove household members
- ▶ Apply for programs (e.g. OW to ODSP)
- ▶ File appeals + track status
- ▶ Book appointments + get appointment reminders
- ▶ Email notifications – new account updates
- ▶ Make payments online
- ▶ Update living arrangement
- ▶ Report asset changes
- ▶ Request new reloadable payment card (RPC) or a replacement

MyBenefits: Chatham-Kent

- The Chatham-Kent Experience
- Implementation Challenges
- Strategic Recommendations

MyBenefits: Chatham-Kent

Chatham-Kent's
total population



103 000

Percent of Caseload
Registered for MyBenefits



15%



Ontario Works Offices



6

Ontario Works 2019
Average Caseload



2431

Case Managers



50



MyBenefits: Chatham-Kent

- SA Mobile Pilot Participant
 - November 2016 to May 2018
 - Registered 20 participants, 2 Case Managers
- MyBenefits Pilot Participant
 - April 2018
 - Soft launch with several staff, gradually whole office participation
 - Full participation in October 2018

MyBenefits: Chatham-Kent

- Subject Matter Experts (SME)
 - Office support and implementation strategy
- SME and Supervisor Training
 - Co-delivery encouraged participation
- Resources
 - Clickable Prototype
 - User Videos
 - Participant Guide
 - Posters

MyBenefits: Chatham-Kent

- Best Practices for Promotion
 - Integrate with application
 - Direct market to income reporting participants
 - Utilize promotional material
- Triage Process
 - SME were able to support peers
 - Supervisor team was able to support both SME and all staff
 - Provincial MyBenefits team was able to support Supervisor group via Slack or through Mybenefits@ontario.ca

MyBenefits: Chatham-Kent

- Case Manager Support
 - Important to demonstrate efficiency with digital solutions
 - Incoming Online Evidence Inbox
- Modernizing Income Reporting Requirements
 - Nov 1, 2014 Policy Memo 'New Income Verification Process'
 - Paystubs only requested at application, the first 3 months after application or the first 3 months after new job
 - Accept pay stub via email

MyBenefits: Chatham-Kent

- Income Reporting Statement
 - A paper income report form is not required if participants are submitting income through MyBenefits
- Address Updates
 - The Case Manager does not need to accept or reject the address change
 - Entitlement and eligibility will not change
 - Prompt to contact Case Manager if housing expenses have changed

MyBenefits: Chatham-Kent

- Paperless Communication
 - Letters won't appear in MyBenefits right away. They are generated at batch run, and will appear one day later
 - Case Manager can remove and restore letters to the client portal
- Managing Uptake
 - Tracking tool
 - Weekly report

MyBenefits: Chatham-Kent

- Adopt the 'New Income Verification Process'
- Incorporate MyBenefits promotion into existing processes
- Brand MyBenefits as the way to report income
- Target ongoing participants with earnings or frequent callers
- Performance manage uptake



THANK YOU!
QUESTIONS?

Appendix



Background

Vision

A modern, responsive, efficient, cost-effective and sustainable service delivery system that is client-centered and supports integration across programs.

- The ministry has been engaging with the 47 municipal delivery partners and ODSP managers across the province to share its vision and strategy.
- Progress is being made on each of the priority areas within the SA Service Modernization Strategy:

✓ **Payments Modernization**

✓ **Client Communications**

✓ **Digital Tools & Process**

✓ **Benefits Delivery**

✓ **Intake**

EDM for ODSP

Current Status



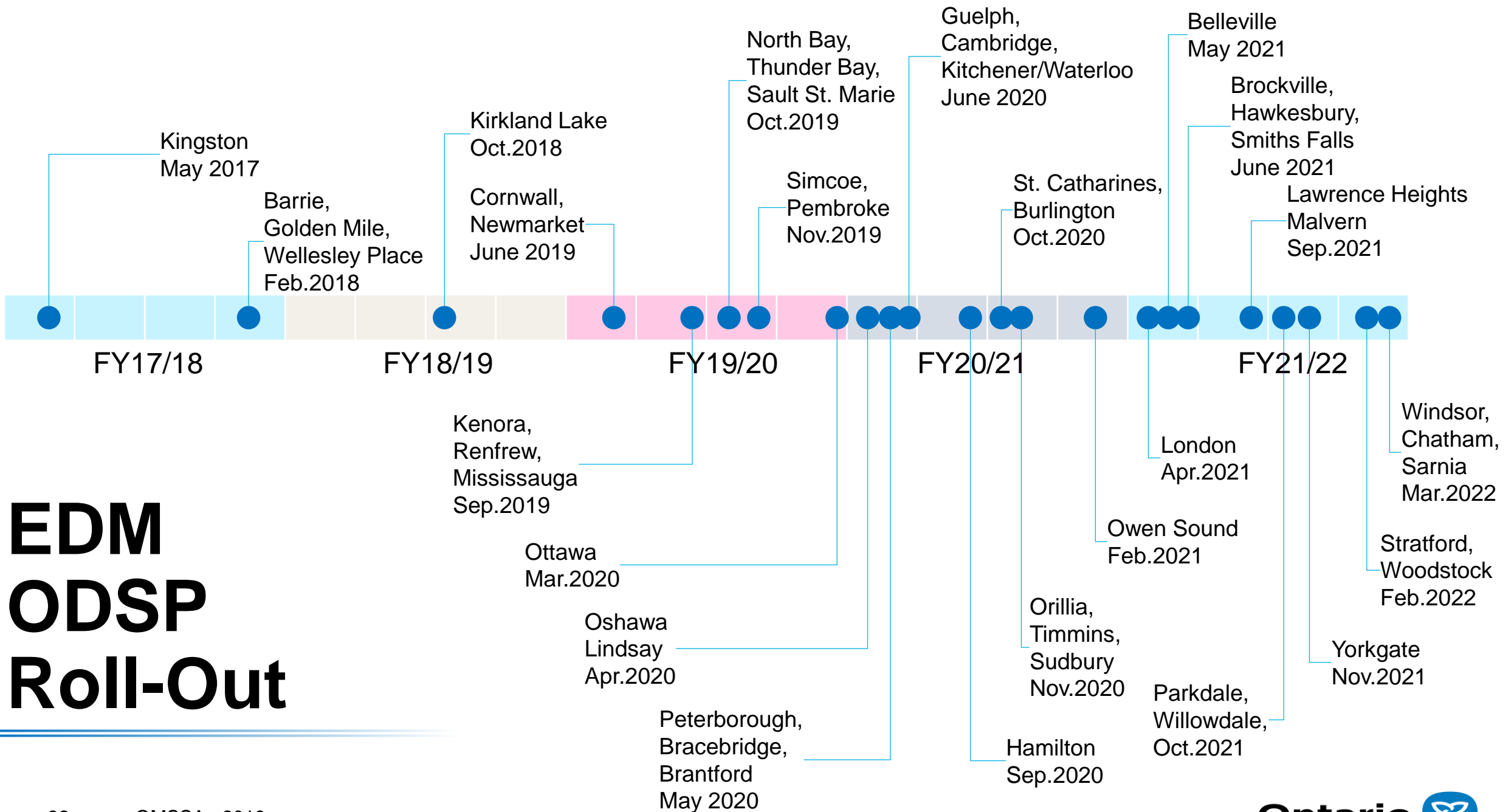
- ✓ A repeatable Roll-Out process: Full digitization of Master Files and Digital Mailroom
- ✓ 13 sites to date. 4 sites remain in Phase 1 by end of FY19/20
- ✓ 2 existing EDM locations are piloting the new MyBenefits Document Upload
- ✓ All of ODSP (47 sites) will be live with EDM by end of FY21/22

Enhancement is ongoing:

- Centralized PO Box Aug'19
- Performance improvement to document search features Aug'19
- Optimize full digitization processes to reduce effort at the EDM locations Nov'19
- Technical improvements to improve operability and ensure stability Q4 FY19/20
- Case Closure and Trigger ODSP digital record series (timing tbc) Q4 FY19/20



EDM ODSP Roll-Out



TESS OW EDM Implementation Update

Preparation

- Ongoing staff communication and updates throughout the year
- Council approval to contract with Nimble in May, Master Agreement and Statement of Work finalized in August. Regular meetings with all parties to action follow up items and track project status
- Creation of joint project team made up of Toronto and MCSS technical and operational staff
- TESS Project team attended multiple site visits at each office to:
 - Assess file room status
 - Meet with management teams to provide an overview of changing business processes
 - Provide an overview of EDM and opportunity for staff to ask questions directly to project team
- Each office created a team of EDM implementation leads
- Training curriculum leveraged ODSP EDM materials and will consist of a combination of WebEx sessions and onsite training
- Job aids and interim processes created to address file inaccessibility during digitization period