Best Practices for Low-Income Energy Assistance Program Oversight and Management

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Agenda

1. Introduction

2. Case Study: Energy Assistance Program

3. Best Practices for Low-Income Assistance Program Administration and Oversight

4. Solix Overview

5. Q&A
Solix Eligibility Solutions

Solix provides expert, eligibility process solutions that improve program efficiency, accuracy and results
Key Results

Solix enables agencies to manage complex eligibility processes achieving results-oriented program outcomes and maximizing the applicant experience.
Energy Assistance Program – Case Study

Project Goal:
Allocate limited subsidy to eligible electric utility customers.

Project Process:
Monthly, Solix reconciles 6.2M customer records from 78 energy providers with 2.3M records from state HHSC databases to identify 600,000 customers eligible for electric discount.
State PUC and Solix Teaming Together

**Program Objectives**
- Accurately and efficiently determine applicant eligibility for program benefits
  - Aggregate and match applicant enrollment information from multiple data points
  - Sort, key, review and approve large volumes of applications
  - Balance efficient turnaround with compliance requirements to meet program goals

**Challenges**

**Solix Solution**
- End-to-end eligibility, qualification and customer care
  - Developed and managed a customized website for information and applicant enrollment options
  - Designed and rolled out a custom platform to facilitate enrollment information

**Results**
- $60M in electric and $20M in telephone awards to be qualified and approved annually
Process Summary

State HHSC transmits to Solix a monthly file of eligible customers based on social services program participation.

Solix completes application reviews, runs matching processes to identify duplicates, and produces lists of company-specific, eligible discount recipients.

Two-Pronged Approach

Individuals submit an application directly to Solix.

Telecom and electric service providers securely retrieve up-to-date eligibility information and provide discounts to their approved customers.
Solix Eligibility Process

Customer Contact → Applications Submitted → Applications Reviewed → Multi-Level Matching Process → Database Updated → Customer Discounts

Call Center → Website → HHSC → Electric and Telephone Providers

HHSC Data → Provider Data → Self-Enroll → Database Updated

Database Updated

Provider Applies Discount

Discount Files to Providers
Solix Oversight Process

This automated process involves:

- Standardizing data
- Identifying and removing duplicate records
- Certifying addresses in accordance with U.S. postal requirements
- Conducting identity verification procedures
- Matching records using pre-defined criteria
- Solix then provides a file to each telephone and electric company identifying their customers who are discount eligible
Waste, Fraud, and Abuse Controls

- Eligibility requirements must meet social services qualification standards
- Customers who apply directly to Solix must:
  - Sign application and attest to its accuracy for program eligibility
  - Submit documentation to verify income for eligibility based on income criteria
  - Renew their eligibility every 7 months (non HHSC-approvals)
- Solix coordinates benefits across multiple providers, relieving providers of that burden
Key Metrics

Solix processes:

- **115 million** customer records annually from **125** telephone companies and **78** electric companies

- **66 million** records annually from state HHSC with records of discount-eligible citizens

- Resulting in **15 million** discounts annually (telephone and/or electric)
Best Practices – Administration

- Results
- People
- Processes
- Technology
- Automation
Best Practices – Multi-Disciplinary Skills in Administration

- Applicant Communication
- Systems Design & Maintenance
- Operations Management
- Financial & Managerial Reporting
- Application Review and Eligibility Determination
- Regulatory Compliance
- Waste, Fraud & Abuse Prevention and Detection
Best Practices – Achieving a Balanced Approach to Program Administration

- Create secure data collection systems with internal controls and reporting capabilities to provide transparency and accountability
- Develop or modify programs quickly while providing efficient and secure collection, payment and reporting processes
- Design the prevention, detection, and investigation of errors, waste, fraud, and abuse into all aspects of processes, policies and systems
- Draw on productive, experienced personnel versed in applying industry best practices

Data Collection

Speed of Delivery

Compliance

People
Best Practices – Program Design Considerations

- Open communication between the Stakeholders, Regulatory Agency and Administrator helps to ensure that the Program is implemented and managed in accordance with the intended statutory and/or regulatory objectives.

- Secure tools (i.e. technology systems) should be designed to allow for thorough data collection, analysis and reporting.
Applying Lessons Learned

- Need to do more with less

- Continued focus on centralized administration

- Goals: Reach the greatest number of qualified recipients, while minimizing opportunities for waste, fraud and abuse

- Standardized processing across subsidies, stakeholders and providers
# About Solix

## Program Eligibility Solutions

<table>
<thead>
<tr>
<th>Program Design</th>
<th>Program Implementation</th>
<th>Operations</th>
<th>Reporting &amp; Compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Intake</td>
<td>Application Processing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Eligibility Determination</td>
<td>Applicant Communication</td>
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<td></td>
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<td>Contact Center Services</td>
<td>Reporting</td>
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<td>Disbursement</td>
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## Service Offerings

- **Resiliency & Recovery Consulting**
- **Grant Management**
- **Platform & IT Services**
- **Eligibility Operations**
- **Consulting, Compliance & Auditing**
- **Rural Healthcare Grant Consulting**

[www.solixinc.com](http://www.solixinc.com)
## Range of Solix Programs

<table>
<thead>
<tr>
<th>State and Local Programs</th>
<th>Federal Programs</th>
<th>Centralized Programs</th>
<th>Public-Private Partnerships</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telecom Universal Service &amp; TRS Funds</td>
<td>Schools &amp; Libraries / E-Rate Program</td>
<td>Lite-Up Texas and Lifeline Programs</td>
<td>Connect2Compete</td>
</tr>
<tr>
<td>FL Dept of Health Biomedical Research Grants</td>
<td>Rural Health Care Program</td>
<td>Arkansas ALIVE</td>
<td>Internet Essentials</td>
</tr>
<tr>
<td>Superstorm Sandy Disaster Recovery</td>
<td>Rural Health Care Pilot Program</td>
<td>DC Lifeline Eligibility Verification Program</td>
<td>Florida State Employees’ Charitable Campaign</td>
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<tr>
<td>CNYRTA Eligibility Audits</td>
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<td>Austin Energy</td>
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www.solixinc.com
Core Competencies

Program Administration
Resiliency & Recovery Planning
Resiliency & Recovery Program Design and Operations Management
Project Management
Case Management
Application Intake
Application Review

Duplication of Benefits Analysis
Eligibility Determination
Program Integrity & Compliance
Program Audit Support
Billing & Collection, Cash Management, Funds Disbursement
Grant Peer Reviews
Agile IT Solutions
## Range of Program Complexity

<table>
<thead>
<tr>
<th>Typical Program Eligibility Criteria</th>
<th>Application Review Complexity</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Federal/State Legislation or Regulations</td>
<td></td>
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<tr>
<td>- Applicant Income</td>
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<tr>
<td>- Eligible Expenses/Cost Reasonableness</td>
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<td>- Title Searches/Liens</td>
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<td>- Medicaid</td>
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<td>- SNAP</td>
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<td>- NSLP Free/Reduced Lunch</td>
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<td>- LIHEAP</td>
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<td>- FPHA</td>
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### Consumer Lifeline Application
- 1-2 page app.
- Typical Support
- **Award:** $120/year

### Rural Healthcare Funding
- 25-30 page app.
- Typical Support
- **Award:** $30K/year

### Biomedical Research Grant Application
- 150 page app.
- Typical Support
- **Award:** $200K/year

### New York City Internet Funding
- 3,000 page app.
- Typical Support
- **Award:** $200M/year
Key Program Benefits to Solix Partnership

- Specialized domain expertise across public sector, regulatory landscape & best practices
- Customized program analytics, monitoring & reporting
- History of Innovation:
  - Program methodology
  - Technology integration
  - Mobile delivery
- Agile and flexible, end-to-end program expertise
- Robust partnership philosophy vs. traditional vendor relationship

Experience: Specialized Talent

- Support & Infrastructure
- Risk & Governance
- Insight & Strategy
- Process & Operations
Solix Contact Information

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