Using data to monitor H.R.1 service delivery impact

Tech Talent Project - Medicaid Delivery Innovation Initiative (MDII)

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Overview

The changes brought about by H.R.1 will have a significant impact on beneficiaries and Medicaid operations. Ensuring the right data is tracked, visible, and reviewed on a regular basis will ensure that any unexpected or high risk impacts can be examined and mitigated quickly.

This document takes a step back from existing specific requirements and describes a set of high-level questions to ask of program data, specific program metrics worth tracking, suggested visualizations with which to examine that data, and a rough process of reviewing that data on a monthly basis to turn data into action.

Terminology

- “WR”: H.R.1 Work Requirements (also known as “community engagement” requirements)
- “Pathway”: Any of the established exclusion, exception, exemption, or compliance criteria
- “RFI”: Request for Information made to the beneficiary to complete the eligibility determination at application or renewal

Approach

To define useful data elements, this document considers the problem space from two different perspectives:

- **Impact** on the following entities:
    - Existing beneficiaries
    - New applicants
    - Caseworkers and call center
- **Opportunities** for improvements in:
    - Operations
    - Customer experience
    - Communications
    - Data sources
    - Automation

Through those perspectives, the following questions and concerns were selected for measurement and observation:

Impacted group	Question
Existing beneficiaries	Is the ex parte rate declining?
Existing beneficiaries	Are more beneficiaries getting disenrolled due to ineligibility?
Existing beneficiaries	Are more beneficiaries getting disenrolled due to non-response?
Caseworkers	Are applications and renewals being processed in a timely manner?
New applicants	Are fewer people applying?
New applicants	Are more applications getting denied?
Existing beneficiaries	How many renewals are meeting the criteria of each WR pathway?
New applicants	How many initial applications are meeting the criteria of each WR pathway?
System	Are certain WR pathways underutilized as compared with expectations?
System: Data sources and algorithms	Are certain WR pathways overrepresented in ex parte renewal failures (requiring manual response)?
System: Comms or UX	Are certain topics dominating call center questions?
System: Comms or UX	Are call center wait times increasing?

New applicants	Are more RFIs being generated as a result of insufficient information in new applications?
New applicants	How many notices of noncompliance are being generated as a result of applicants not meeting WR?
New applicants	Is the RFI response rate changing?
New applicants	Is the automated approval rate going down?
New applicants	What is the notice of noncompliance response rate?
New applicants	Does the application success rate vary across channels? Do online portal applicants fare better or worse than applications submitted in the Local Offices?
Existing beneficiaries	Are more RFIs being generated as a result of insufficient information in manual renewal submissions?
Existing beneficiaries	Is the RFI response rate changing?
New applicants and existing beneficiaries	Are certain RFI questions more likely to result in non-response?
System: Customer experience	Are self-service submission channels being underutilized?
Existing beneficiaries	Are more beneficiaries churning out and back into coverage?

Additionally, the following cross-cuts to the above questions could highlight sub-population impact:

- What are the relative impacts by county?
- What are the relative impacts by census tract?
- What are the relative impacts to populations segmented by preferred spoken language?
- What are the relative impacts to populations segmented by declared race?

These questions were chosen for three reasons. First, because they are worth tracking in their own right. Second, because a subset of the data supporting the answers to the questions matches up with the set of statistics that comprise mandatory CMS reporting. Finally, because the way the data will be organized to answer these questions also lends itself to more fine-grained analysis. For example, having the information that provides the answer to, “How many renewals are

meeting the criteria of each WR pathway?" along with the answer to, "relative impacts to populations segmented by preferred language?" allows us to answer a more specific query like, "how many beneficiaries whose preferred language is Spanish are meeting WR through education enrollment". Or as another example, it may show us that a particular aspect of the process (e.g., ex parte renewal) is failing more often than expected for a particular subgroup.

Suggested metrics to track

The following metrics follow from the above questions, and are summarized with relevant cross-cuts and audiences. The audience recommendations here err on the side of "default to transparency," with metrics relevant to community partners informed by input from a community-based organization.

Metric	Cross-cuts	Internal?	Public?	Community Partner?
Monthly % expansion adult renewals successful	WR pathways, county, census tract, spoken language, race	•	•	•
Monthly % expansion adult renewals ex parted successfully	WR pathway, county, census tract, spoken language, race	•	•	•
Monthly % expansion adult renewals manually renewed successfully	WR pathways, county, census tract, spoken language, race	•	•	•
Monthly % expansion adult renewals found ineligible	county, census tract, spoken language, race	•	•	•
Monthly % expansion adult renewals procedurally terminated	county, census tract, spoken language, race	•	•	•
Monthly % expansion adult renewals pending / completed after renewal date	WR pathways, county, census tract, spoken language, race	•		
Monthly % expansion adult renewals triggering an RFI by RFI reason	county, census tract, spoken language, race	•		
Monthly % expansion adult renewal RFIs responded to by RFI reason	county, census tract, spoken language, race	•		
Median pending expansion	county, census tract,	•		

adult renewal age over time	spoken language, race			
Monthly new application count over time	county, census tract, spoken language, race	•	•	•
Monthly % new expansion adult applications approved	WR pathways, county, census tract, spoken language, race	•	•	•
Monthly % new expansion adult applications found ineligible/procedurally denied (including due to not meeting WR)	ineligibility/procedural denial reason, county, census tract, spoken language, race	•	•	•
Monthly % new expansion adult applications procedurally denied	county, census tract, spoken language, race	•	•	•
Monthly % expansion adult applications triggering an RFI by RFI reason	county, census tract, spoken language, race	•		
Monthly % expansion adult applications RFIs responded to by RFI reason	county, census tract, spoken language, race	•		•
Monthly % expansion adult applications triggering a notice of noncompliance	county, census tract, spoken language, race	•		•
Monthly % of expansion adult application notices of noncompliance responded to	county, census tract, spoken language, race	•		•
% documents submitted via each channel over time	county, census tract, spoken language, race	•		
Median pending application age over time	county, census tract, spoken language, race	•		
Median pending renewal age over time	county, census tract, spoken language, race	•		
Monthly expansion adult churn re-enrollment rate over time (% expansion adult members disenrolled per month who end up re-enrolled within 3 months)	county, census tract, spoken language, race	•	•	•

Note that while some of the data needed to support tracking these metrics may not yet be implemented and will require the development and implementation of new requirements, understanding how current performance compares with past performance will be important to understand the impact of H.R.1 changes, particularly in light of seasonal differences in the beneficiary population year-over-year. Therefore, where possible, when implementing new technical requirements to support data tracking, project leadership should try to backfill any new data tracking at least through January 2026 to allow year-over-year comparison.

Suggested data visualizations

While tracking data is important to enable reporting and investigation, visualizations are important for surfacing trends and enabling quick review. Leveraging the metrics above, the suggested visualizations below can help answer the questions enumerated earlier.

Each visualization should be part of a dashboard that has filters by month, county, spoken language, and race, allowing multiple of these filters to be selected to drill down by multiple attributes.

In addition to internal use, some visualizations may prove useful to public and community partner audiences, as indicated.

Visualizations	Description	Questions answered	Additional Audiences
Renewals			
Ex parte success rate over time, broken down by expansion adult and non-expansion adult populations	Line graph with month on the x axis, showing ex parte success, with one line representing the ex parte rate for expansion adult beneficiaries, another for non-expansion adult beneficiaries, and another for overall ex parte rate	· Is the ex parte rate declining?	Public
% of successful manual expansion adult renewals over time, broken down by WR pathway	Line graph with month on the x axis, and % of manual renewals on the y axis, with each line representing the percentage of renewals successfully complying with each WR pathway. An	· Are certain WR pathways overrepresented in ex parte renewal failures (requiring manual response)?	Comm. Partner

	overall line represents the total manual renewal success rate.		
% of current monthly cohort successful renewals verifying each WR pathway	Toggle with two modes: (1) Multiple pathways allowable per individual (adds to more than 100%), (2) Single pathway per individual as defined by pathway prioritization. A horizontal, stacked bar chart showing one bar per pathway and the % of beneficiaries in the cohort successfully verifying that pathway. The stacked bar has two parts—one represents pathways verified via ex parte, and the other represents pathways verified via manual renewal.	· How many renewals are meeting the criteria of each WR pathway? · Are certain WR pathways underutilized as compared with expectations?	Public/ Comm. Partner
Ultimate outcome of renewals over time	Stacked bar graph with month on the x axis, and bar segments representing % of each ultimate outcome in the cohort (successful ex parte, successful manual renewal, ineligible, procedurally terminated, pending).	· Are more beneficiaries getting disenrolled due to non-response? · Are more beneficiaries getting disenrolled due to ineligibility?	Public/ Comm. Partner
% of successful expansion adult renewals in current monthly cohort by county	Horizontal bar chart with counties on the y axis and % successful expansion adult renewals on the x axis, sorted by %. Might highlight top 5 and bottom 5 if space constrained.	· Are more beneficiaries getting disenrolled due to non-response? · Are more beneficiaries getting disenrolled due to ineligibility? · What are the relative impacts by county?	Public/ Comm. Partner

% of successful expansion adult renewals in current monthly cohort by spoken language	Horizontal bar chart with spoken languages on the y axis and % successful expansion adult renewals on the x axis, sorted by %	· Are more beneficiaries getting disenrolled due to non-response? · Are more beneficiaries getting disenrolled due to ineligibility? · What are the relative impacts to populations segmented by preferred spoken language?	Comm. Partner
% of successful expansion adult renewals in current monthly cohort by race	Horizontal bar chart with race indicators on the y axis and % successful expansion adult renewals on the x axis, sorted by %	· Are more beneficiaries getting disenrolled due to non-response? · Are more beneficiaries getting disenrolled due to ineligibility? · What are the relative impacts to populations segmented by declared race?	Comm. Partner
Applications			
New expansion adult application count over time	Area graph with month on the x axis, with stacked values for applications submitted each month representing approved applications, ineligible applications due to not being able to meet WR, ineligible applications for any other reason, procedurally denied applications	· Are fewer people applying? · Are more applications getting denied?	Public/ Comm. Partner
% of successful expansion adult applications over time	Line graph with month on the x axis and each line representing % of successful applications initiated in that month found eligible for via each WR pathway. An	· How many initial applications are meeting the criteria of each WR pathway? · Are certain WR	Public

	overall line highlights the overall expansion adult application success rate for the month	pathways underutilized as compared with expectations?	
% of expansion adult applications generating a notice of noncompliance over time	Stacked line graph with month on the x axis and a line representing % of applications, and stacked values for % returned, % pending, and % not returned	· How many notices of noncompliance are being generated as a result of applicants not meeting WR? · What is the notice of noncompliance response rate?	Comm. Partner
% of successful expansion adult applications initiated in current monthly cohort by county	Horizontal bar chart with counties on the y axis and % successful expansion adult applications on the x axis, sorted by %. Might highlight top 5 and bottom 5 if space constrained.	· Are more applications getting denied? · What are the relative impacts by county?	Public/ Comm. Partner
% of successful expansion adult applications initiated in current monthly cohort by spoken language	Horizontal bar chart with spoken languages on the y axis and % successful expansion adult applications on the x axis, sorted by %	· Are more applications getting denied? · What are the relative impacts to populations segmented by preferred spoken language?	Comm. Partner
% of successful expansion adult applications initiated in current monthly cohort by race	Horizontal bar chart with race indicators on the y axis and % successful expansion adult applications on the x axis, sorted by %	· Are more applications getting denied? · What are the relative impacts to populations segmented by declared race?	Comm. Partner
RFIs			

% of initial expansion adult applications that triggered RFIs, broken down by reason, over time	Line graph with month on the x axis, with each line representing an RFI reason and the % of expansion adult applications that triggered those RFIs in the month. An additional line would track overall RFI trigger rate for expansion adult applications per month	· Are more RFIs being generated as a result of insufficient information in new applications?	
% of expansion adult renewals that triggered RFIs, broken down by reason, over time	Line graph with month on the x axis, with each line representing an RFI reason and the % of expansion adult renewals that triggered those RFIs in the month. An additional line would track overall RFI trigger rate for expansion adult renewals per month	· Are more RFIs being generated as a result of insufficient information in manual renewal submissions?	
% of RFIs that were closed as successfully answered, broken down by submission channel, over time	Stacked line graph with month of RFI trigger along the x axis, showing the % of RFIs that were answered, with each stacked element being a submission channel	· Are self-service submission channels being underutilized?	
% of RFIs that were closed as successfully answered, broken down by RFI reason	Bar chart of % RFIs triggered in the cohort month that were successfully answered, with a bar representing each RFI reason, sorted by response rate	· Is the RFI response rate changing? · Are certain RFI questions more likely to result in non-response? · Are certain RFI questions more likely to result in non-response?	
Operational			
WR pathway for all enrolled expansion adult beneficiaries as of today	Horizontal bar chart with WR pathways on the y axis and count of individuals on the x axis, including a y axis bar for "not yet determined" (because first post-January 1 renewal has not occurred)	· Are certain WR pathways underutilized as compared with expectations?	Public

Monthly expansion adult churn re-enrollment rate over time	Line graph with % expansion adult members disenrolled per month who end up re-enrolled within 3 months	· Are more beneficiaries churning out and back into coverage?	Comm. Partner
Call center hold times over time	Line graph with x axis as days and y axis representing average hold time in minutes	· Are call center wait times increasing?	
Monthly Medicaid applicant/beneficiary call reasons	Bar chart of top call reasons (counts) for the selected month	· Are certain topics dominating call center questions?	
Median Medicaid application age (days since submission) over time	Line graph of median Medicaid application age, captured at the day granularity	· Are applications and renewals being processed less timely?	
Median Medicaid manual renewal age (days since submission) over time	Line graph of median manual Medicaid renewal age, captured at the day granularity	· Are applications and renewals being processed less timely?	

Caveats and notes

- Filters:
    - **Renewal month:** All graphs that reflect data for a single monthly renewal cohort will be controlled by a selector in the left-hand navigation for choosing the renewal month
    - **County:** All data displayed can be filtered by county
- If the state eligibility system assesses all WR pathways instead of stopping at evaluating one, when statistics are broken down by WR pathway, the sum of the pathways may add up to more than 100%. For all the visualizations that separate statistics by WR pathway, it is worth considering making them available in two modes:
    - One mode in which all eligible pathways for each individual are included
    - An alternate version in which the data is collapsed to only reflect zero or one WR pathways for each individual, based on pathway prioritization

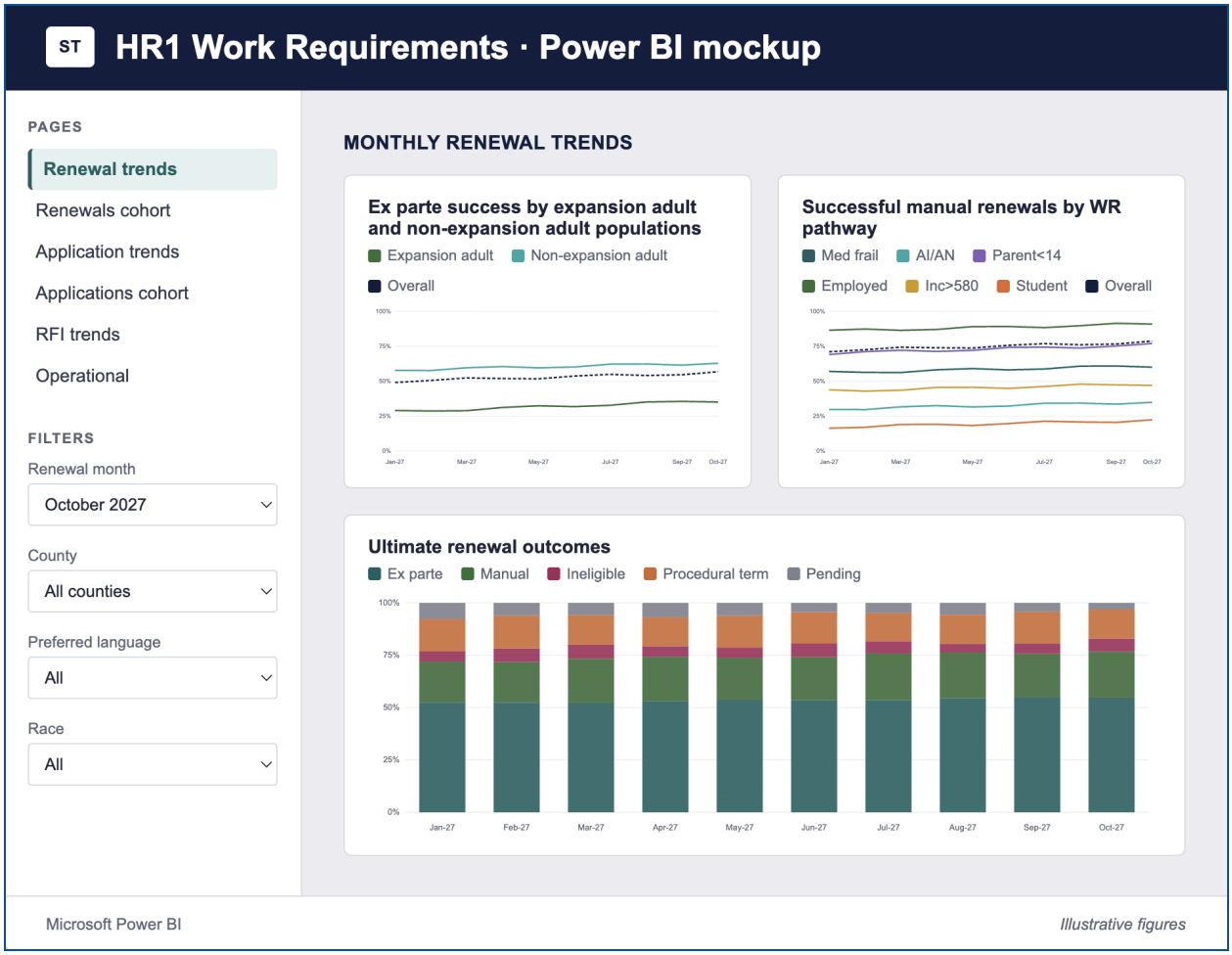
(persistent characteristics such as AI/AN race take precedence over shorter duration pathways)

- While some visualizations specify that they should include data about expansion adult applications or beneficiaries, others do not because the data may have importance when looking at the broader beneficiary population. Project leadership should determine which visualizations should be isolated to the expansion adult population only. When displaying data that is inclusive of non-expansion adult beneficiaries where a breakdown by WR pathway is displayed, non-expansion adult beneficiaries could be presented in a “not expansion adult” category.
- Age groupings have been omitted as a possible filter. This can be quite valuable in assessing the characteristics of Medicaid recipients in general, but were omitted here because the focus is exclusively on expansion adults. A community partner indicated that segmenting by 19-25, 26-54, and 55-64 might highlight differences in career longevity and technical literacy among various adult groups within the expansion population.

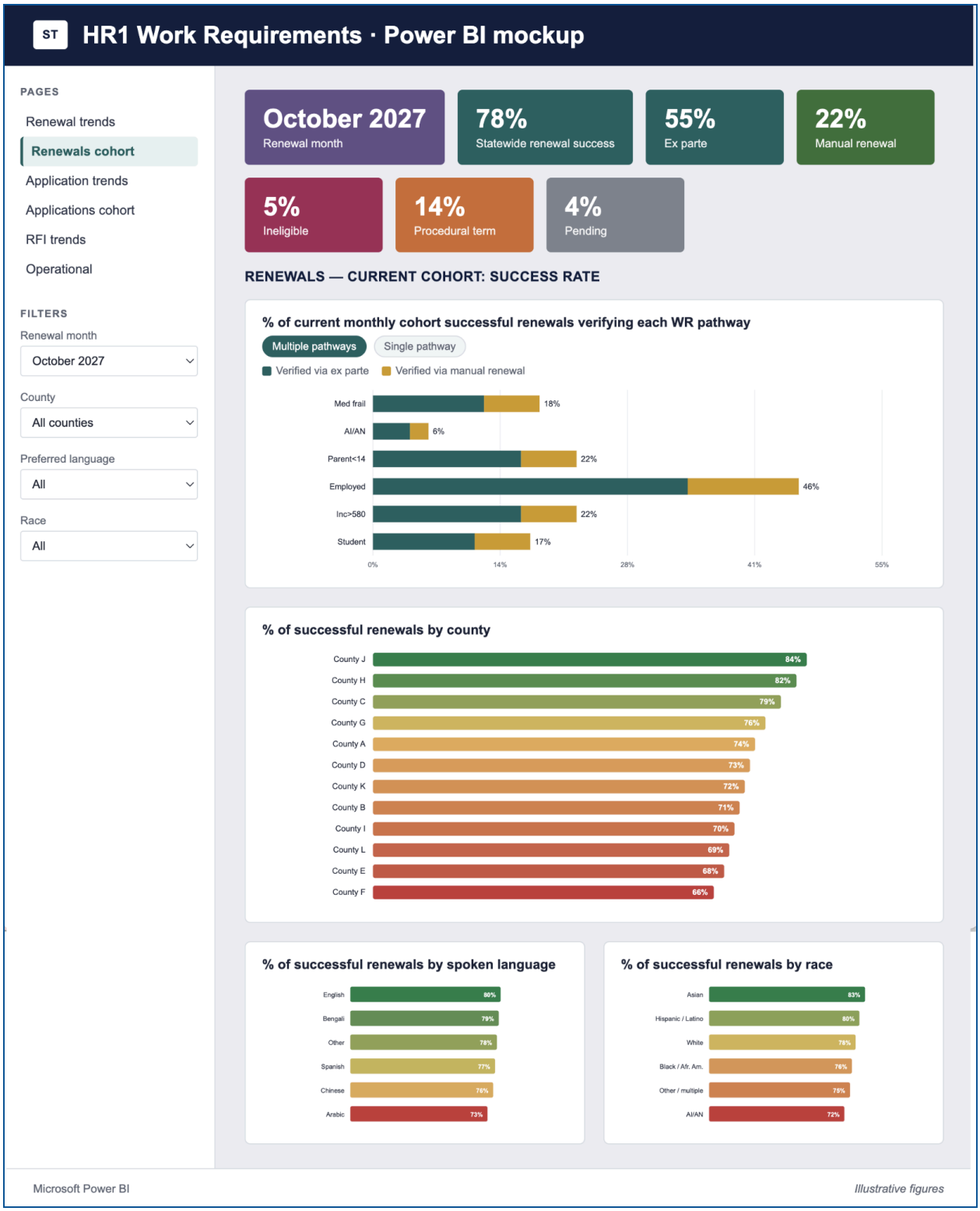
Example dashboards

Below are example internal dashboard mock-ups intended as illustrative examples for the above visualization recommendations. They’re organized across 6 screens based on topic and monthly cohort drill-ins or over time trend analysis. These are mocked up to mirror visualization style available in PowerBI, but can be adapted to whatever dashboarding tool a state may have available.

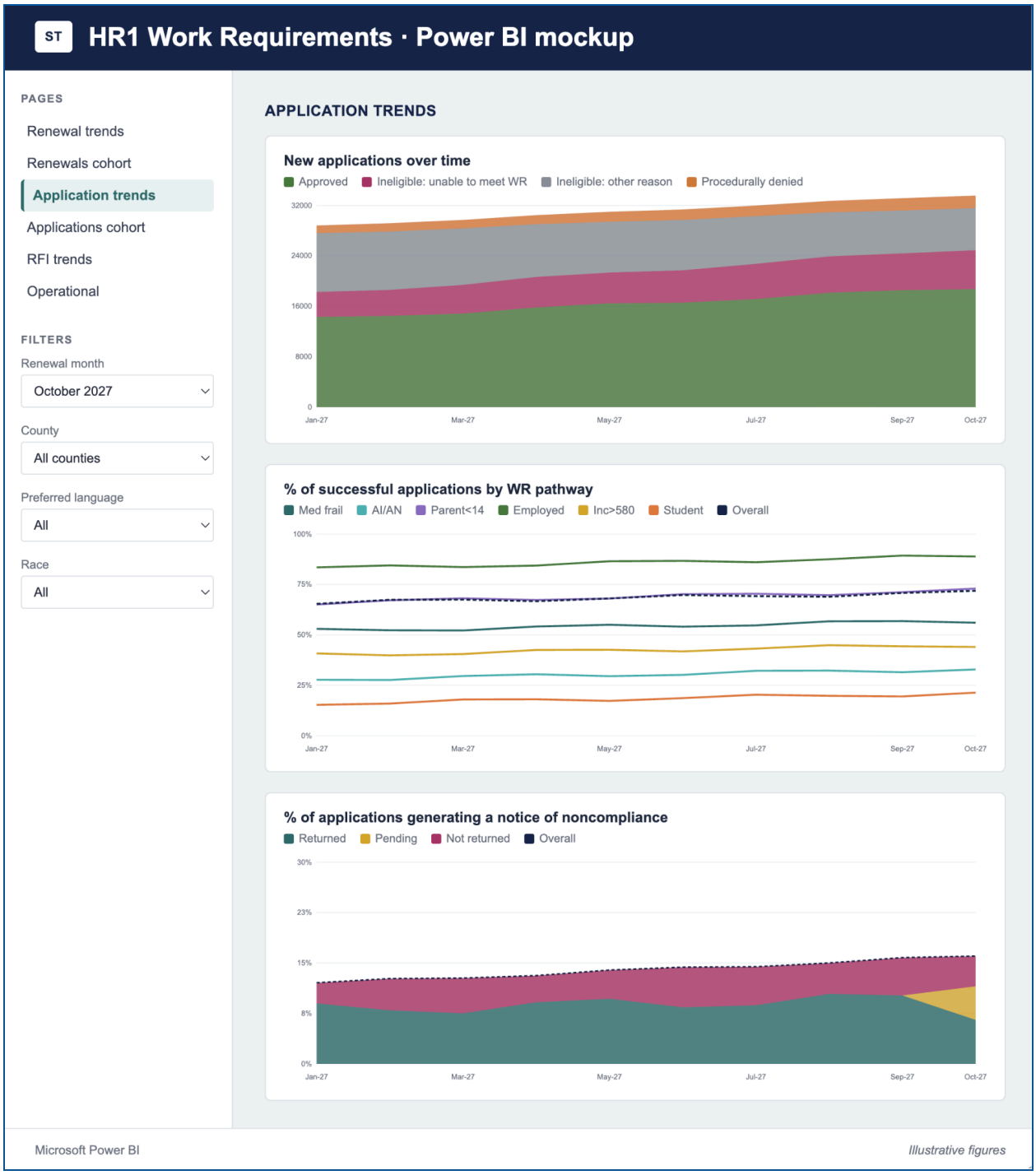
Additional variants of these proposed dashboards that are public-facing and community partner-facing are available in the Appendix.



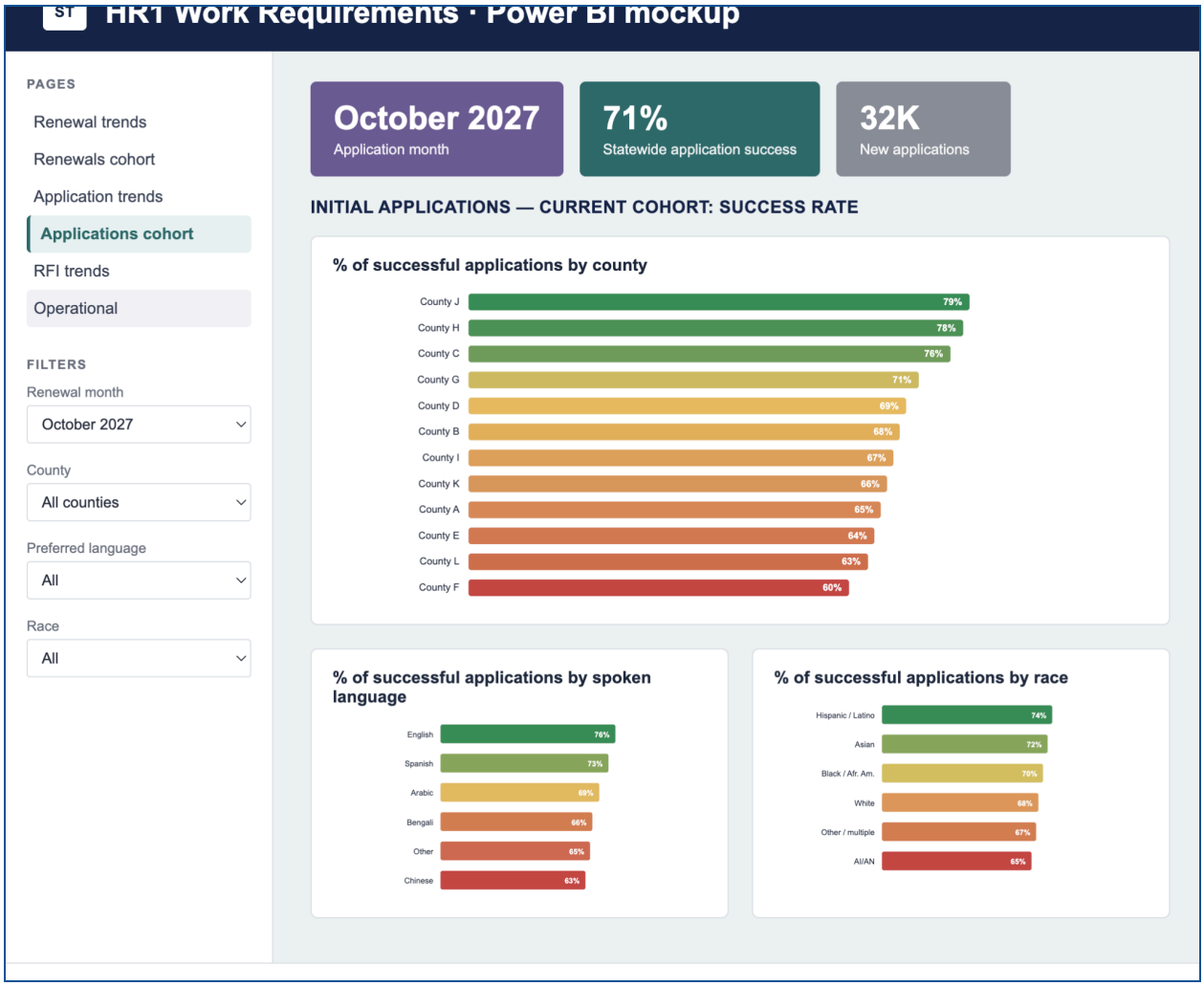
Renewal trends



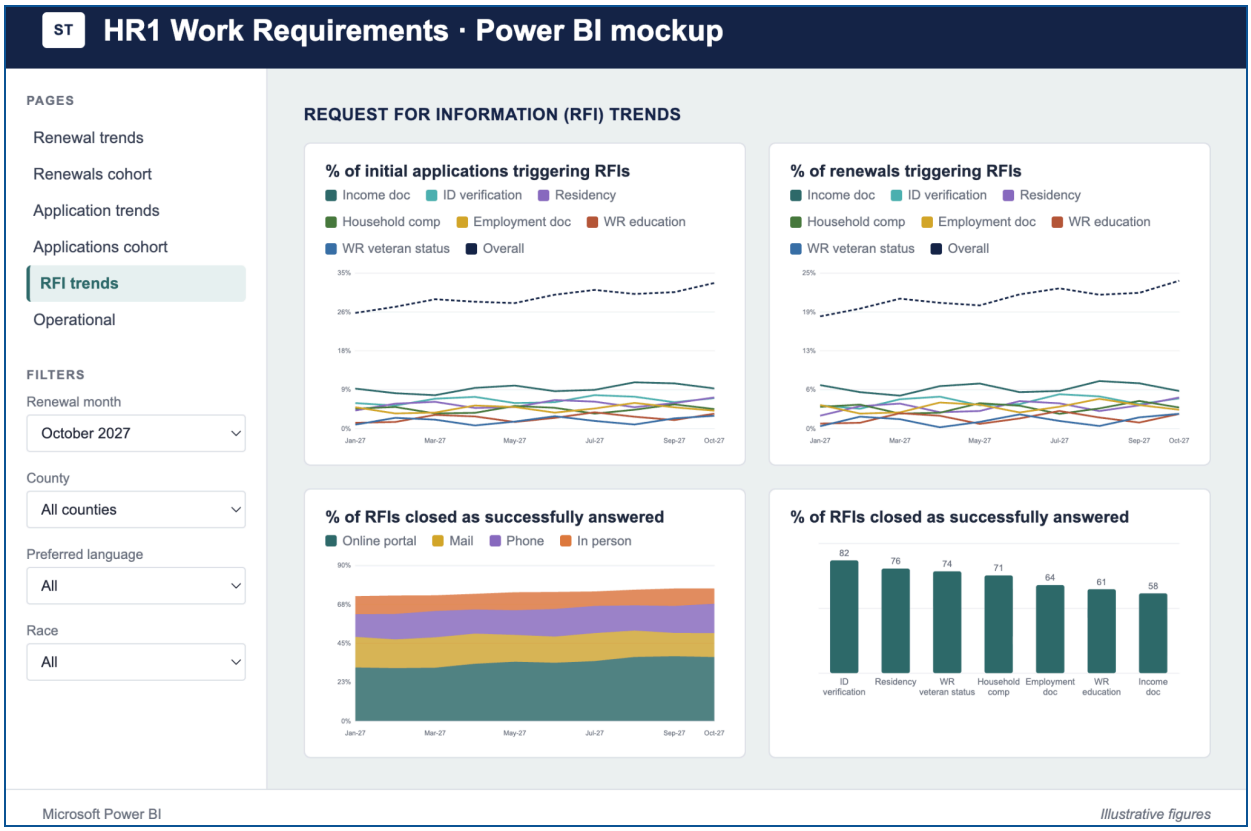
Renewal cohort view



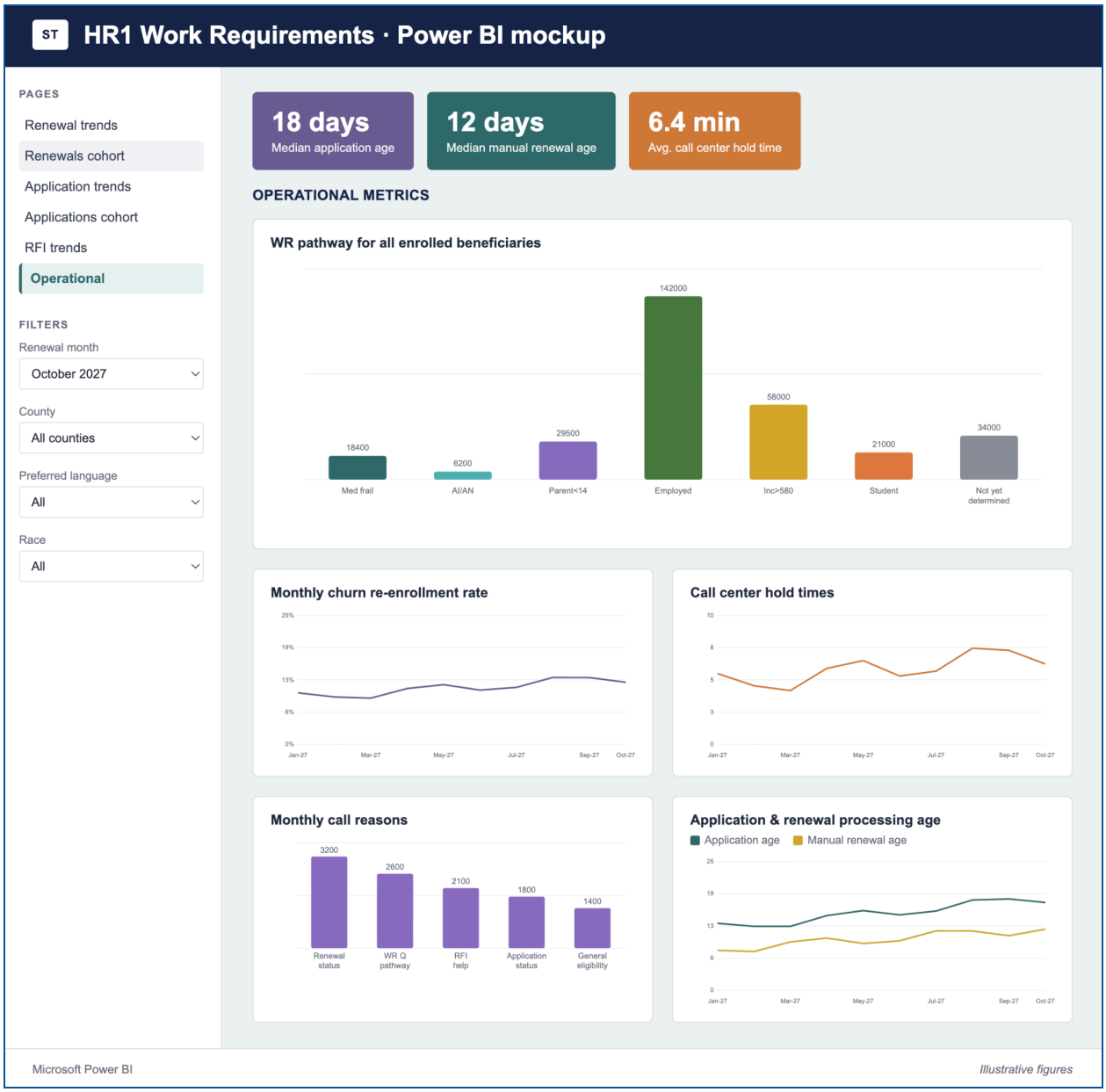
Application trends



Application cohort


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HR1 Work Requirements · Power BI mockup
PAGES
Renewal trends
Renewals cohort
Application trends
Applications cohort
RFI trends
Operational
FILTERS
Renewal month
October 2027
County
All counties
Preferred language
All
Race
All
REQUEST FOR INFORMATION (RFI) TRENDS
% of initial applications triggering RFIs
Income doc
ID verification
Residency
Household comp
Employment doc
WR education
WR veteran status
Overall
35%
26%
18%
9%
0%
Jan-27
Mar-27
May-27
Jul-27
Sep-27
Oct-27
% of renewals triggering RFIs
Income doc
ID verification
Residency
Household comp
Employment doc
WR education
WR veteran status
Overall
25%
19%
13%
6%
0%
Jan-27
Mar-27
May-27
Jul-27
Sep-27
Oct-27
% of RFIs closed as successfully answered
Online portal
Mail
Phone
In person
90%
68%
45%
23%
0%
Jan-27
Mar-27
May-27
Jul-27
Sep-27
Oct-27
% of RFIs closed as successfully answered
82
76
74
71
64
61
58
ID verification
Residency
WR veteran status
Household comp
Employment doc
WR education
Income doc
Microsoft Power BI
Illustrative figures

RFI trends



Other operational metrics

Data review operational plan

The team recommends a monthly review meeting that may be structured as described below. Please note that the role titles are intentionally organized by areas of responsibility that should be present, rather than current organizational structure, so it is possible that one human maps to multiple roles.

Frequency

Monthly, 60 minutes, held 7–10 business days after the month-end data refresh so the latest renewal cohort is complete. A 90-minute quarterly session reviews longer-term trends, equity patterns, and the improvement roadmap.

Attendees (by role)

Role	Responsibility
Analytics lead (facilitator)	Owns the dashboard; prepares the pre-read, frames trends, flags outliers and data quality issues
Eligibility / policy owner (Medicaid–expansion adults)	Interprets pathway, exclusion, and outcome trends against policy; resolves policy questions
Renewals & applications operations manager	Owns caseworker throughput, turnaround time, and backlog actions
Member communications lead	Owns RFI volume, call drivers, and member-facing messaging
IT / data engineering representative	Owns data quality, portal flow, and ex parte / automation logic
Equity & population health analyst	Monitors disparities by county, language, race, and income type
Program owner (decision maker)	Prioritizes actions, approves resourcing, owns escalations

Questions to address

Risks to watch	Opportunities to pursue
• Is the ex parte rate declining, and are disenrollments rising from ineligibility vs. procedural non-response? • Are RFIs from insufficient information rising for applications	• Which pathways are underutilized vs. expectation — a comms, UX, or awareness gap? • Which pathways are verifiable from available data sources — candidates for automation that cuts manual work and RFIs?

Risks to watch	Opportunities to pursue
or manual renewals, and which questions drive non-response? • Are particular counties or language / race / income-type groups showing disparate non-compliance or non-response? • Are worker turnaround times, backlogs, or call-center wait / abandonment growing?	• Where would targeted outreach to a high-risk segment or month have the most impact?

Example meeting agenda

Time	Agenda item
Pre-read (async, ~48h prior)	Facilitator sends the dashboard snapshot and 3–5 flagged items; no cold data exploration in the meeting
0–5 min	Confirm data refresh / quality and the status of prior-month actions
5–20 min	Exception-based trend scan — outcomes, ex parte / manual, applications, RFIs; discuss only deltas and outliers
20–40 min	Deep-dive on 1–2 prioritized risks or opportunities (e.g., a pathway or sub-population outlier); discuss root cause
40–55 min	Decide actions — each gets a single owner and a due date
55–60 min	Recap decisions; set next month's watch list

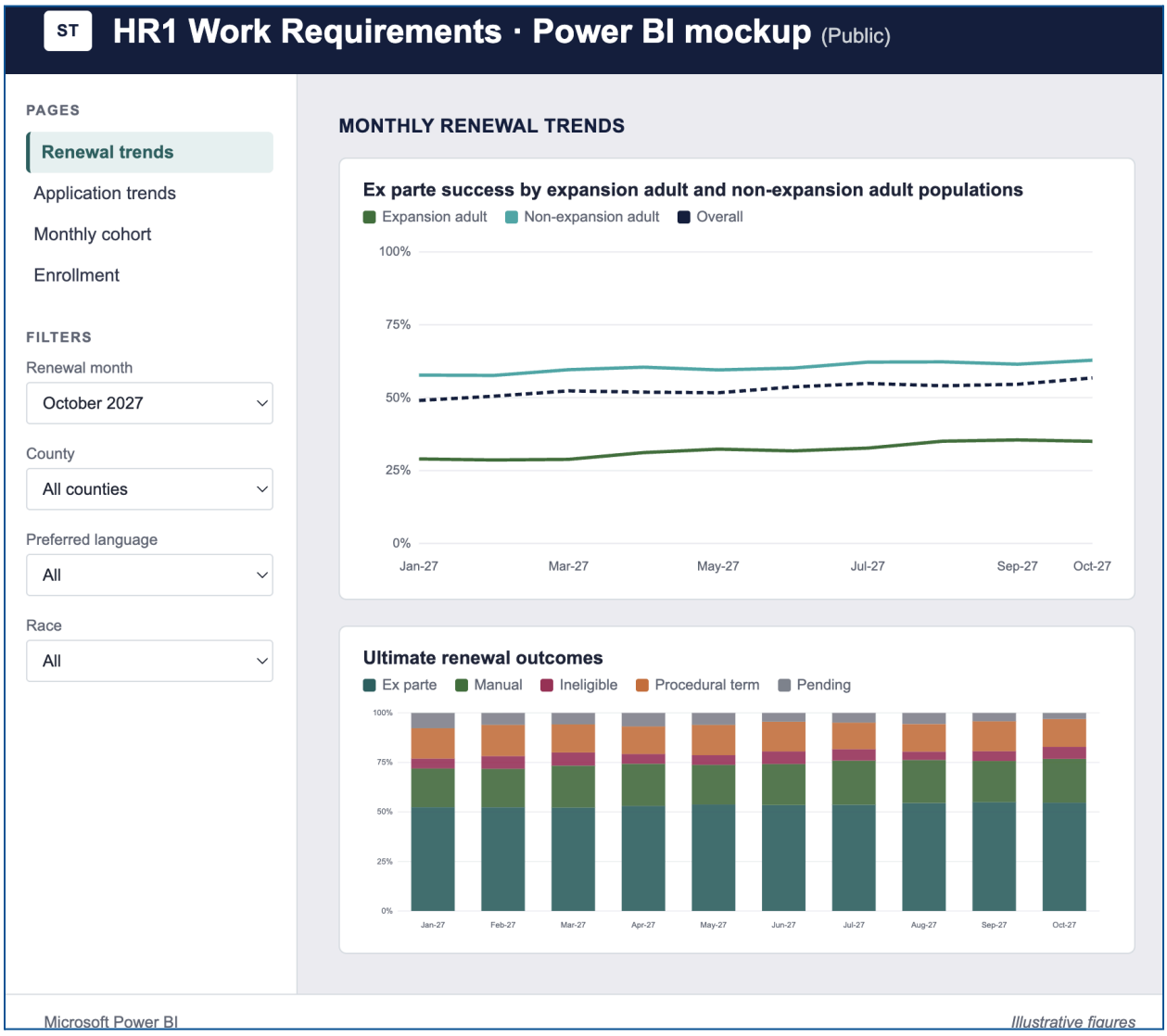
A note about discipline: stay exception-based (focus on what changed), make one decision per issue, and create a parking lot for tangents rather than solving them live.

Outputs

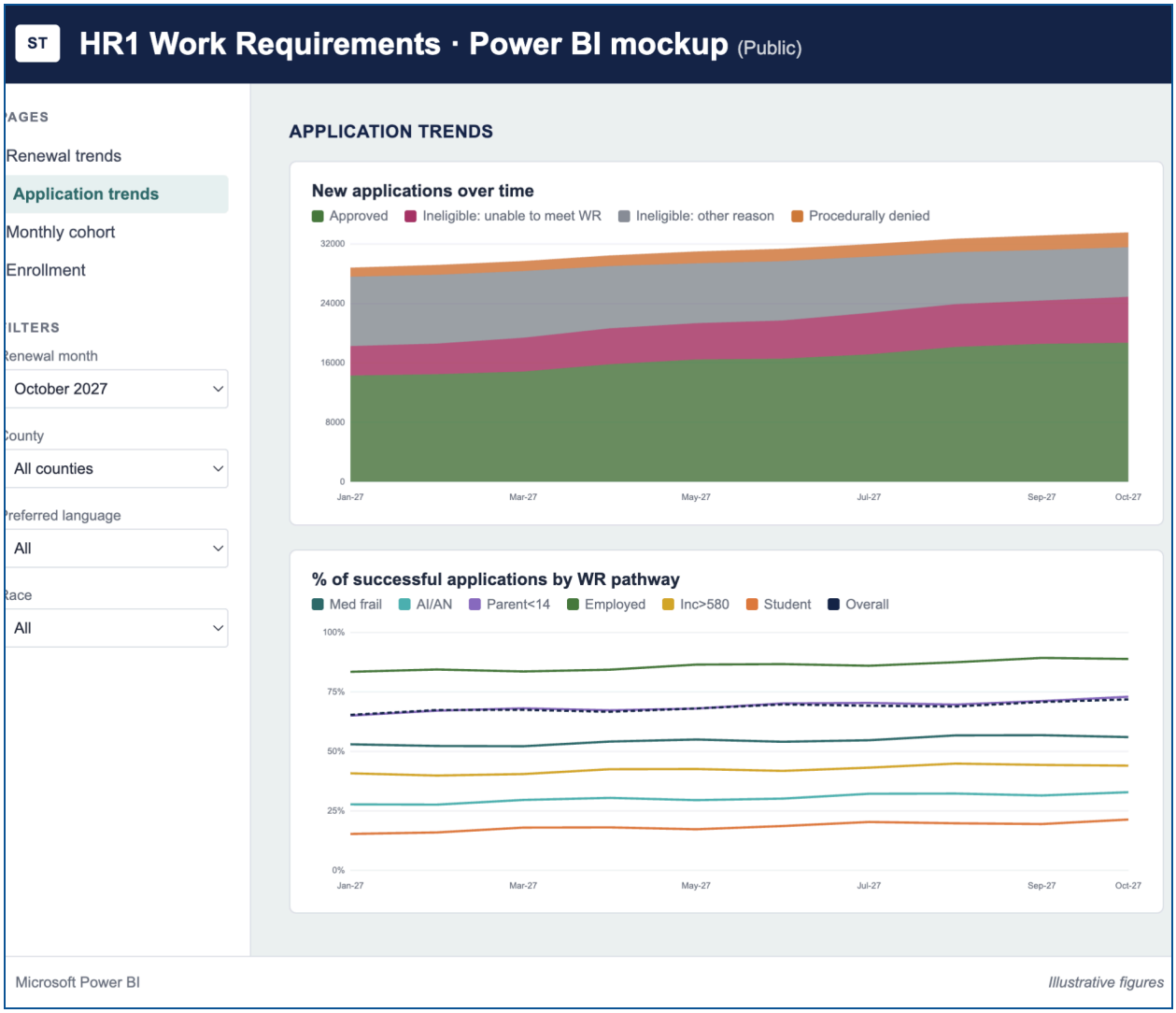
- A decision log — prioritized issue → owner → action → due date — reviewed closed-loop at the next meeting
- An updated watch list of metrics, pathways, and segments to monitor next cycle
- Escalations routed to policy, IT / automation, or communications as needed
- Quarterly themes — automation candidates, comms changes, equity findings — feed the improvement roadmap

Appendix

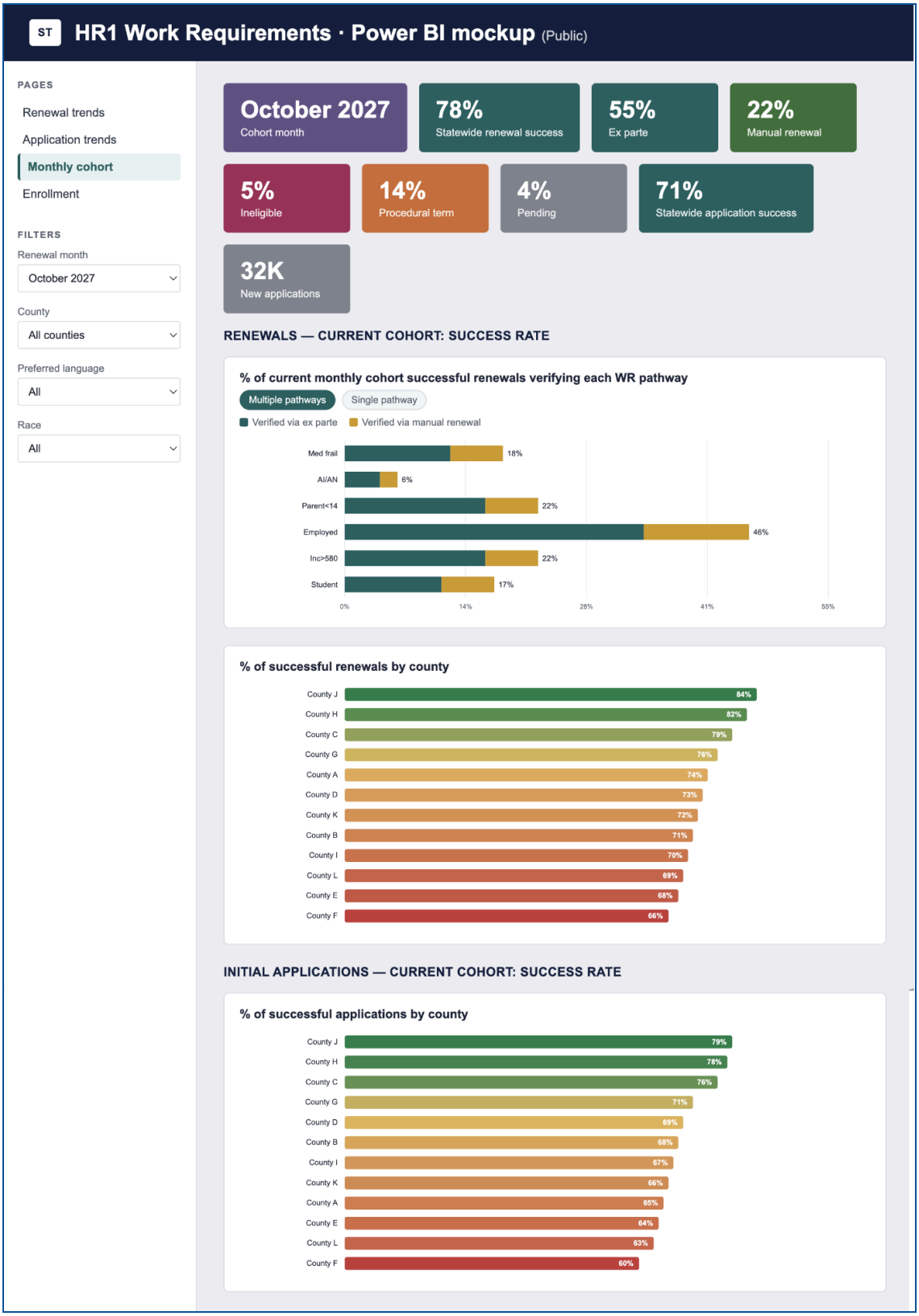
Public-facing dashboard mockups



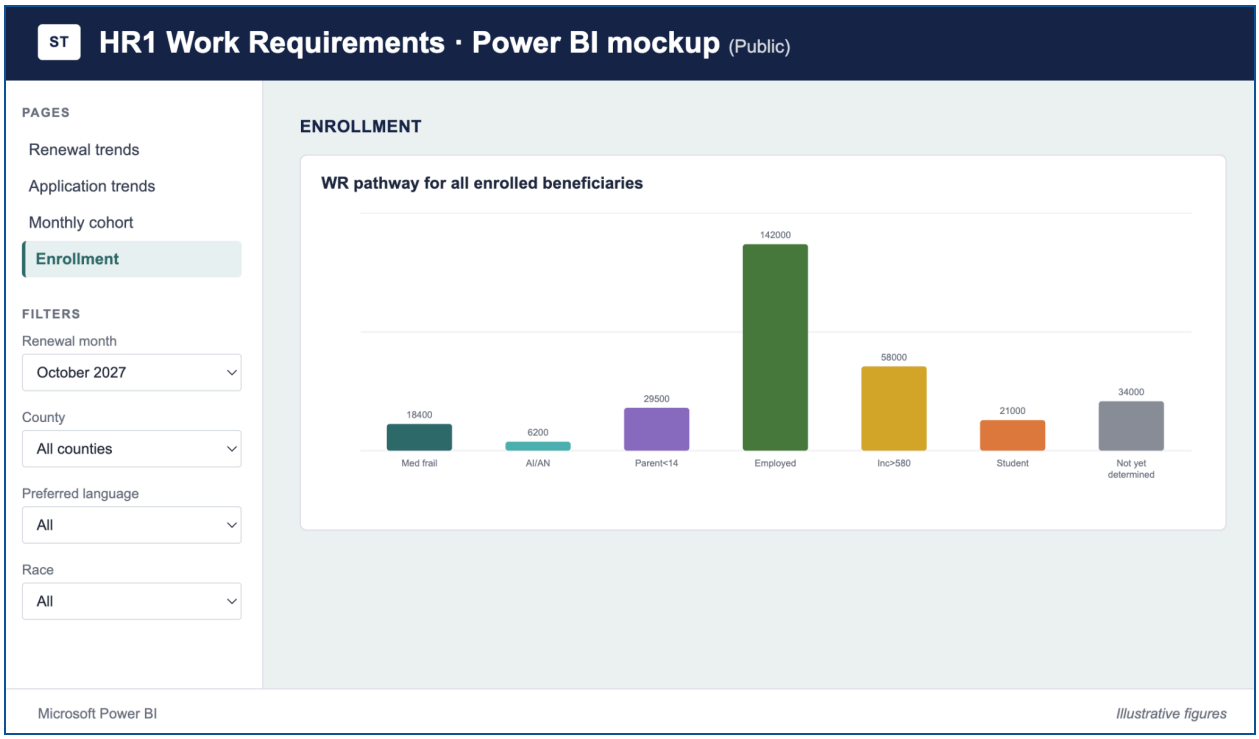
Renewal trends



Application trends

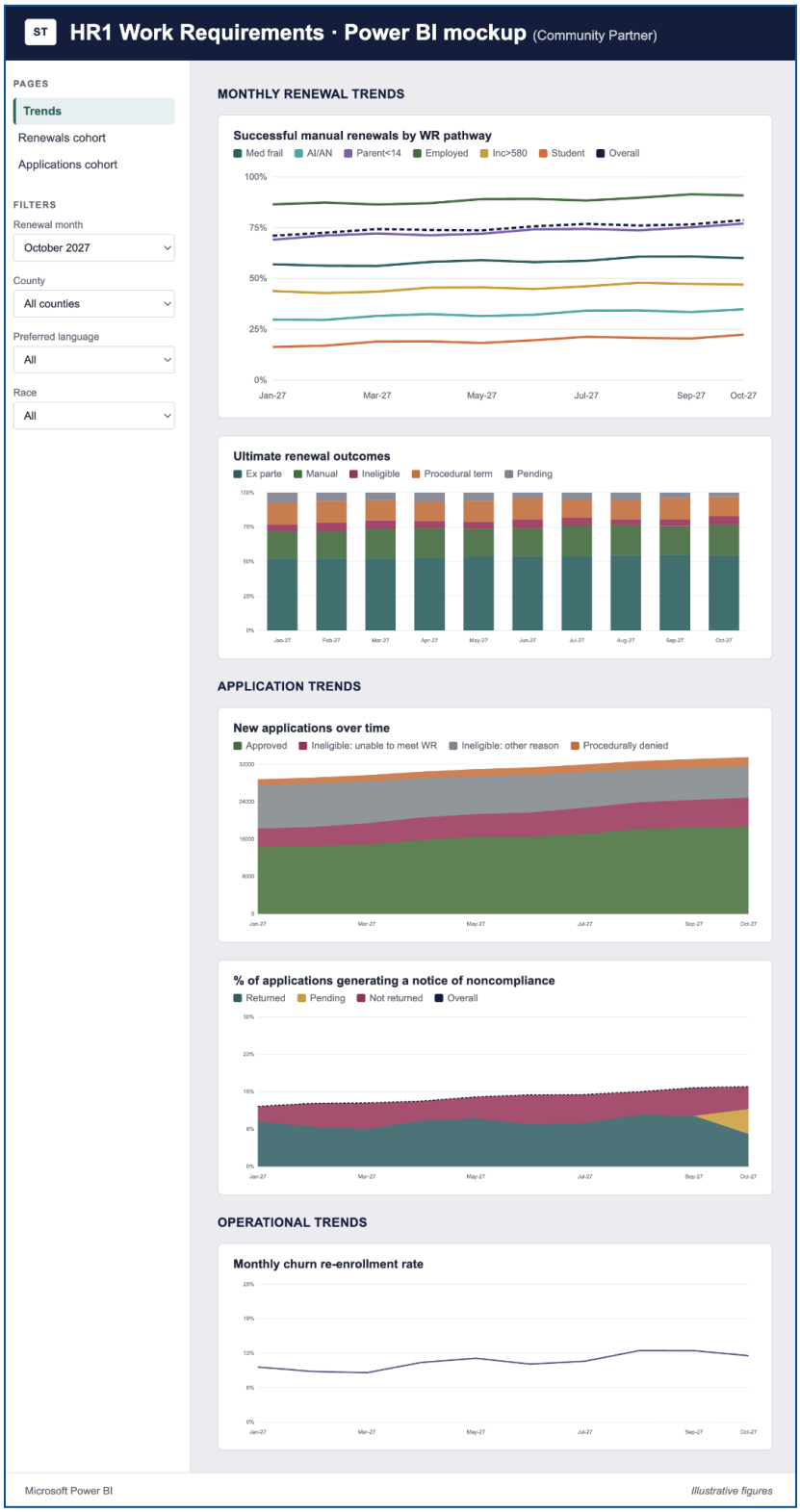


Monthly cohort data

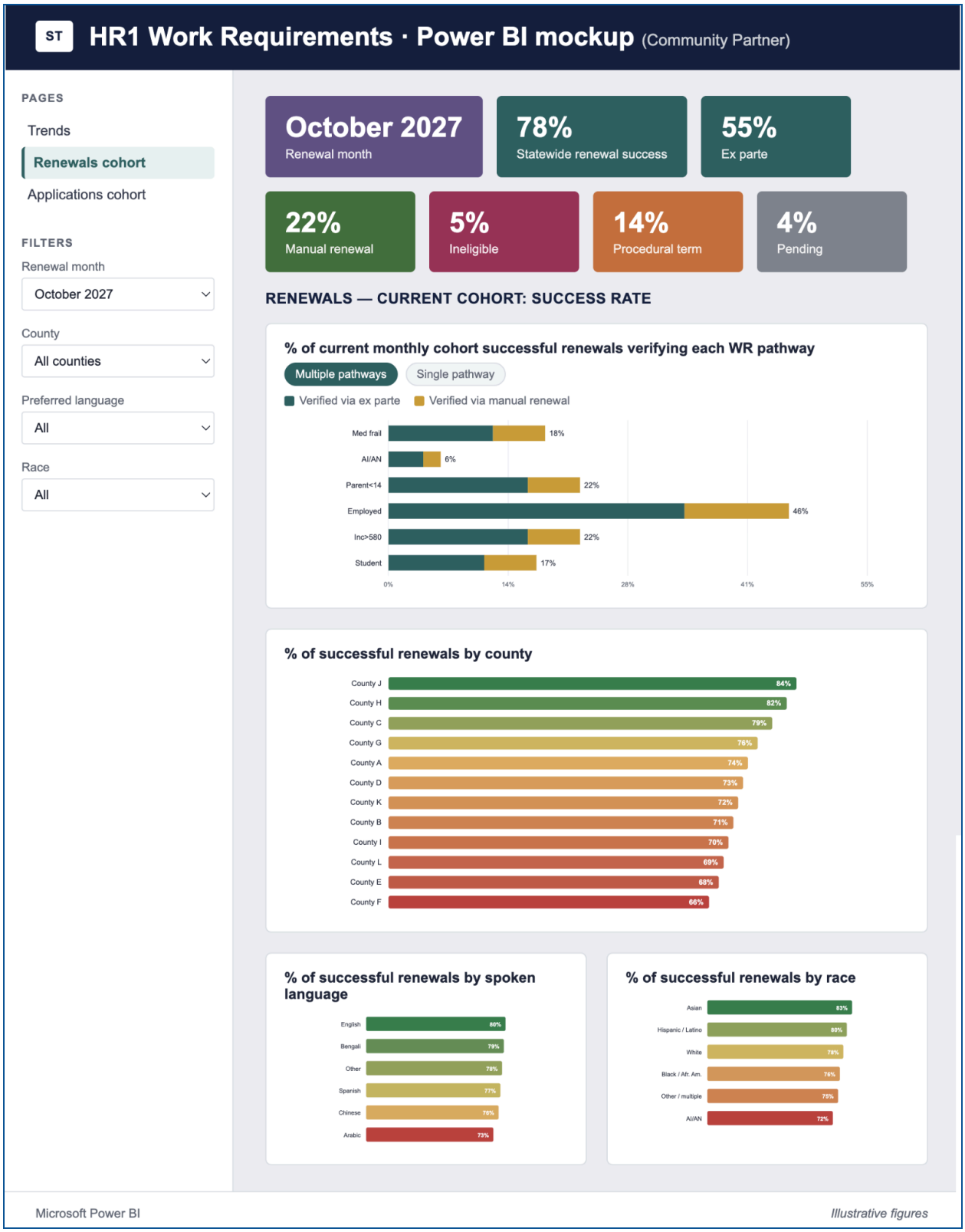


Overall enrollment WR snapshot

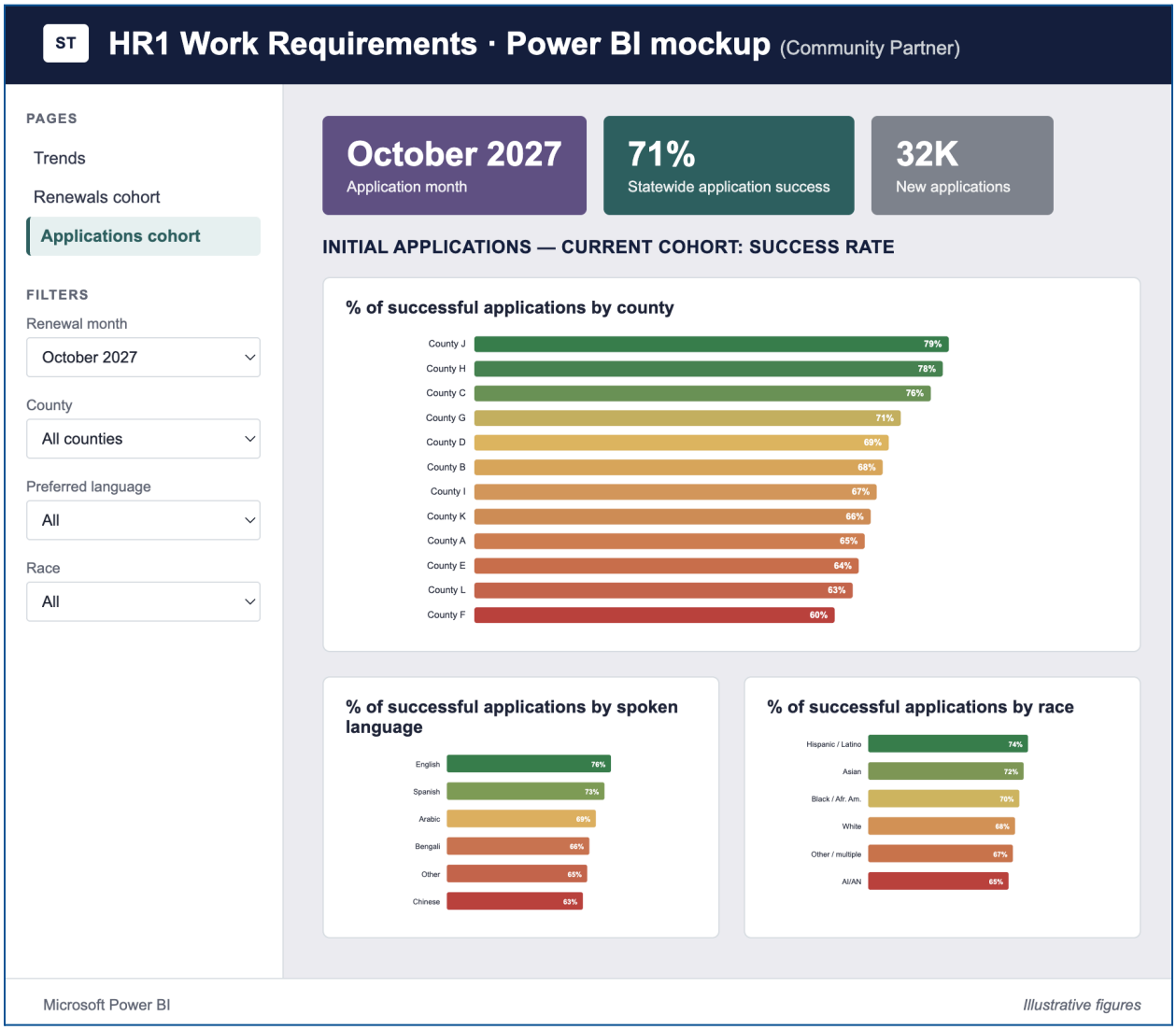
Community partner-facing dashboard mockups



Enrollment trends



Renewals cohort



Applications cohort