

NCSL Health Innovations Task Force

AI and Medicaid: A Practical Guide



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Who are we?

Danny Mintz, Ph.D., Director of Safety Net Policy

- I provide policy insight to inform Code for America's work with states and guide our safety net strategy

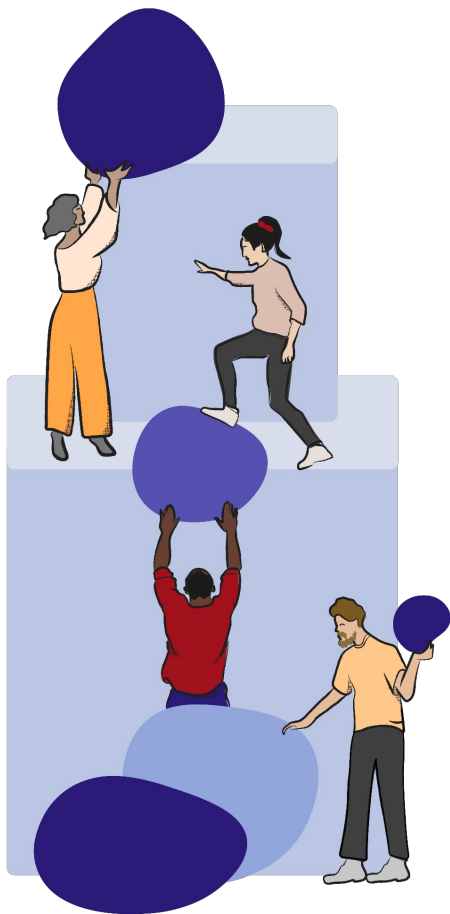
Jenn Thom, Ph.D., Senior Director of Data Science

- I lead Data Science at Code for America and drive our AI strategy.
- My background is in consumer tech and I built AI systems at Amazon Alexa and Spotify.

Today's agenda

- State AI readiness: a high-level view
- AI for Medicaid
 - Identifying the right problem
 - Finding the right solution
- Promising use-cases for AI implementation
- Key questions for legislators and other stakeholders

Your questions are welcome throughout our conversation!



About Code for America

We use human-centered technology to improve public services and make government work well for everyone.

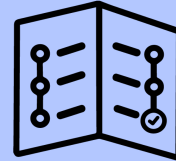
Our work spans
safety net, tax benefits,
and **criminal justice**

CODE *for* AMERICA

**Safety
Net**



**Tax
Benefits**



**Criminal
Justice**



Federal

State

Local

We work in all
three levels of government

We're people-centered problem solvers

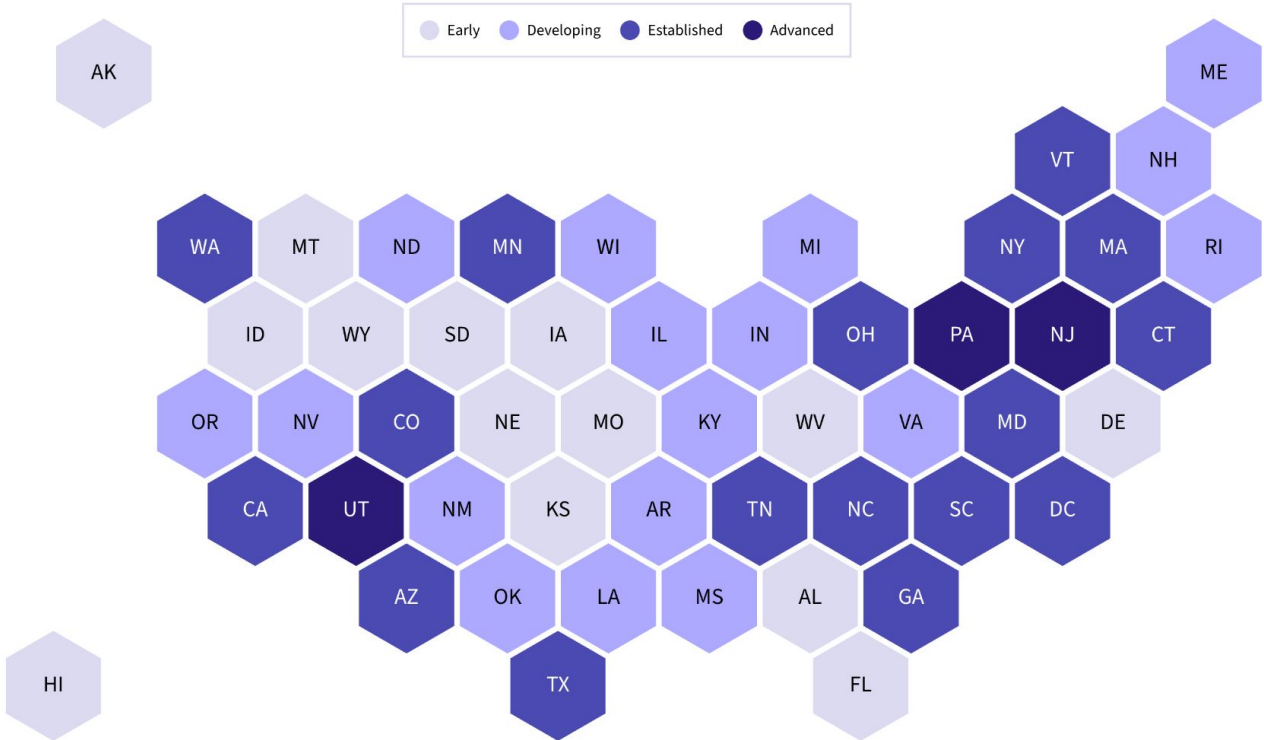
showing that with the mindful use of technology
government can work well for *everyone*

**How are you
feeling about AI?**



State AI readiness

Code for America's Government AI Landscape Assessment



Government AI Landscape Assessment - goals

Objectives

- Provide a structured snapshot of state AI readiness across all 50 states
- Benchmark progress across core domains to guide investment and policy

Inputs

- Executive orders
- Legislation and policies
- Agency guidance and reports
- Media and trade articles
- Direct state input

Maturity Model



3 Major Dimensions of AI Readiness

- **Leadership & Governance:** organizational structure and leadership dedicated to AI initiatives
- **AI Capacity Building:** the state's investments in developing AI literacy, skills, and expertise across its workforce
- **Technical Infrastructure & Capabilities:** the technical foundation needed for quality data and advanced AI implementations

A quick refresher on AI



AI and Automation - Key Terms

- Robotic Process Automation (RPA)
 - Software "bots" that mimic human actions to automate high-volume, repetitive, rule-based digital tasks.
 - Good for process automation
- Machine Learning (ML)
 - ML models use statistics to learn patterns from large, defined datasets.
 - Good for personalization and prediction
- Generative AI (GenAI)
 - An advanced form of AI, most commonly powered by Large Language Models (LLMs) like the one in ChatGPT. They are trained on massive, internet-scale data.
 - Good for synthesis, summarization and creation of new text, software code and images

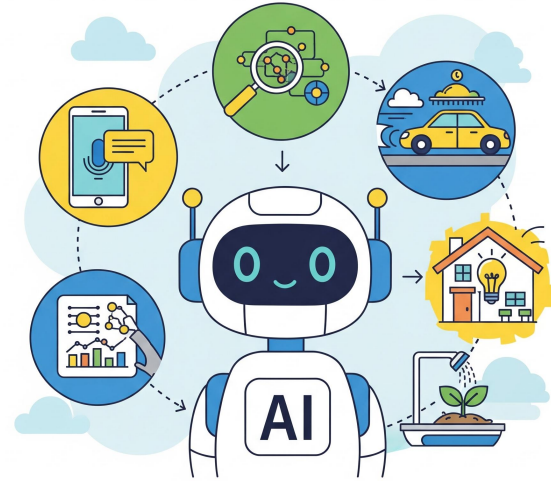


Image created by Gemini

When is GenAI the right tool for the job?

- You have unstructured data you need to present in a structured way
- You need high-level analysis of a large amount of unstructured information
- You need to make policy, notices, or other documents easier for people to understand
- You need a solution for a human-labor intensive task involving unstructured data
- You have plans and resources to monitor performance over time

When is GenAI not the right tool for the job?

- You need precise outputs from structured information
- You need to do math with repeatable and reliable calculations
- You are unable to monitor performance over time
- You need human judgment to make a critical decision

AI and Medicaid

Identify the problem



Start with your problems.

1.

Problems

Identify key pain points and bottlenecks.

2.

Solutions

Identify solutions that address the problems.

3.

Applications

Assess the solutions and products.

What do state Medicaid systems look like?

Imagine a business with online sales where...

- The sales inventory is not connected to the the point of sale *or* client-facing website
- The Customer Relations Management software is from 2009 and it takes 9 months to make any changes
- Critical documents are stored in a warehouse a block away
- Mission critical information is stored in a file folder in the back office and you have to pay each time you open it

...That's a state Medicaid system!

Eligibility workers are the frontline of state Medicaid programs

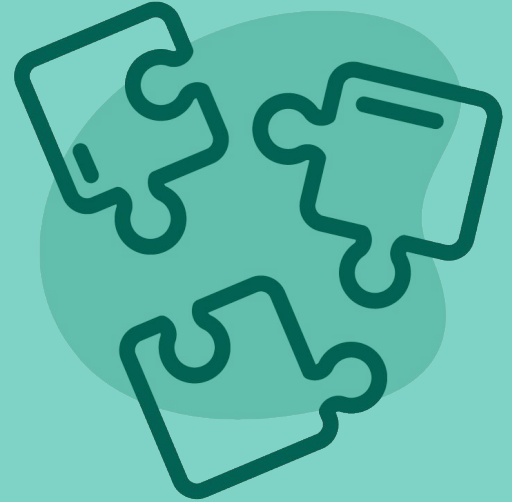
AI solutions must meet their needs.

Key problems state Medicaid programs face

- For eligibility workers:
 - Clunky, fragmented systems
 - Duplicative, manual data entry
- For state agencies:
 - New policy changes break existing automation
 - New requirements threaten hard-won gains in real-time eligibility.
- For applicants:
 - Clunky or confusing tools and policies make compliance harder than it needs to be.
- For eligibility workers, applicants and agencies:
 - Slow verification processes stall applications, frustrating applicants and making it harder to work through caseloads.

AI and Medicaid

Identify the solution



AI Use Case Areas for Government

Accessibility & Language Services

Make government communications clearer and more accessible through AI-powered translation and adaptation services.

-  **Plain Language Translation**
Simplify complex government language
-  **Multi-language Translation**
Translate official documents across languages
-  **AI for Accessibility**
Convert content into accessible formats

Conversational Interfaces

Guide citizens and staff through complex processes with intelligent chat and navigation assistance.

-  **Public Service Chatbot**
Answer questions about government services
-  **Program Navigator**
Guide through program eligibility
-  **Civil Servant Copilot**
Assist with decision-making and tasks

Data Quality & Analysis

Ensure data accuracy and extract meaningful insights through automated validation and analysis.

-  **Document Classification**
Categorize using machine learning
-  **Filtering & Segmentation**
Create meaningful data segments
-  **Data Preparation & Validation**
Ensure standardized data quality

Data Matching & Deduplication

Connect and clean data across systems to create unified, accurate records.

-  **Intelligent Record Linking**
Connect records across databases
-  **Data Deduplication**
Remove duplicates preserving details
-  **Advanced Entity Resolution**
Unify information across sources

Document Intelligence

Automate document processing workflows while maintaining security and compliance.

-  **Document Generation**
Create from multiple input sources
-  **Document Extraction**
Extract data from documents
-  **Document Redaction**
Remove sensitive information

Process Automation

Streamline administrative tasks and workflows to improve efficiency and accuracy.

-  **Government Form Fill**
Automate form completion
-  **Workflow Routing**
Optimize work distribution
-  **Application Processing**
Streamline application workflows

Regulatory & Policy Analysis

Evaluate policy impacts and ensure compliance across complex regulatory frameworks.

-  **Policy Impact Analysis**
Evaluate policy change effects
-  **Compliance Checking**
Assess regulatory compliance
-  **Legal Document Analysis**
Analyze legal requirements

Risk & Fraud Detection

Identify patterns and anomalies to prevent fraud and improve program outcomes.

-  **Anomaly Detection**
Identify opportunity patterns
-  **Risk Assessment**
Evaluate access barriers
-  **Pattern Recognition**
Detect improvement opportunities

As an eligibility worker

I waste time **navigating confusing menus and unnecessary screens.**

I am forced to **manually re-enter the same client data**, which is slow and causes errors.

→ **Opportunity:** Pull information from documents to pre-populate case management software.

→ **Opportunity:** Pull data from documents for different downstream uses like income verification.

Solution: Data Extraction

What is it?

Documents, like forms, consist of unstructured data. That's data that doesn't have a format and can't be searched.

AI can be used to retrieve data (like names, dates, addresses) and put them into a format that can be read by machines.

Court: District County
Colorado County: El Paso
Court Mailing Address: 200 Main St

Parties:
Petitioner: People of the State of Colorado
v.
Defendant: Johnathan Q. Doe

Case Number: DV212020CRR5500

Objection to Automatic Sealing
pursuant to § 13-3-117

The State Court Administrator's Office has included this case in a compiled list of eligible convictions pursuant to § 13-3-117, which was provided to the District Attorney for review on (date) February 2, 2024.

The District Attorney hereby objects to the automatic sealing of this case pursuant to § 13-3-117(3)(a) for the reason selected below, and files this notice as an Objection to Automatic Sealing pursuant to 13-3-117 within 45 days of the date listed above.

- A condition of the plea was that the defendant agreed to not have the conviction sealed.
- The defendant has a pending criminal charge.
- The defendant has an intervening conviction.
- The conviction is ineligible for sealing under 13-3-117, 24-72-703 and/or 24-72-706.
- The conviction is a felony conviction and is not an offense in article 18 of title 18. There is reasonable belief that the public interest safety in retaining public access to this case outweighs the privacy interest of or adverse consequences to the defendant, and that such belief is grounded in supporting facts. Any available supporting documents are included with this filing.

Because the District Attorney has filed this notice as an Objection to Automatic Sealing, the State Court Administrator's Office will remove this case from the compiled list of eligible cases. The court shall notify the defendant that such objection was filed. Should a defendant request a hearing pursuant to 13-3-117(3)(IV), the court will set a hearing pursuant to 24-72-706 and notify the parties.

Name: Attilus Barrister, District Attorney, Bar #: 55005
Signature: A. B. Date: March 8, 2024

JDF 2361 – Objection to Automatic Sealing Pursuant to 13-3-117 R: February 1 2024 Page 1 of 1

```
{  
  "court_type": "District",  
  "county": "El Paso County",  
  "case_number": "DV212020CRR5500",  
  "objection_reason": "Ineligible Felony",  
  "attorney_bar_number": 55005,  
  "filing_date": "March 8, 2024"  
}
```

Applying the Solution: Data Extraction

Example Application

Create a tool that combines traditional and AI functionality pulls relevant information from back-end data matches and user-submitted documents to pre-populate screens in the worker's eligibility system.

The tool provides easy access to the source documents so that workers can check for accuracy.

As an eligibility worker

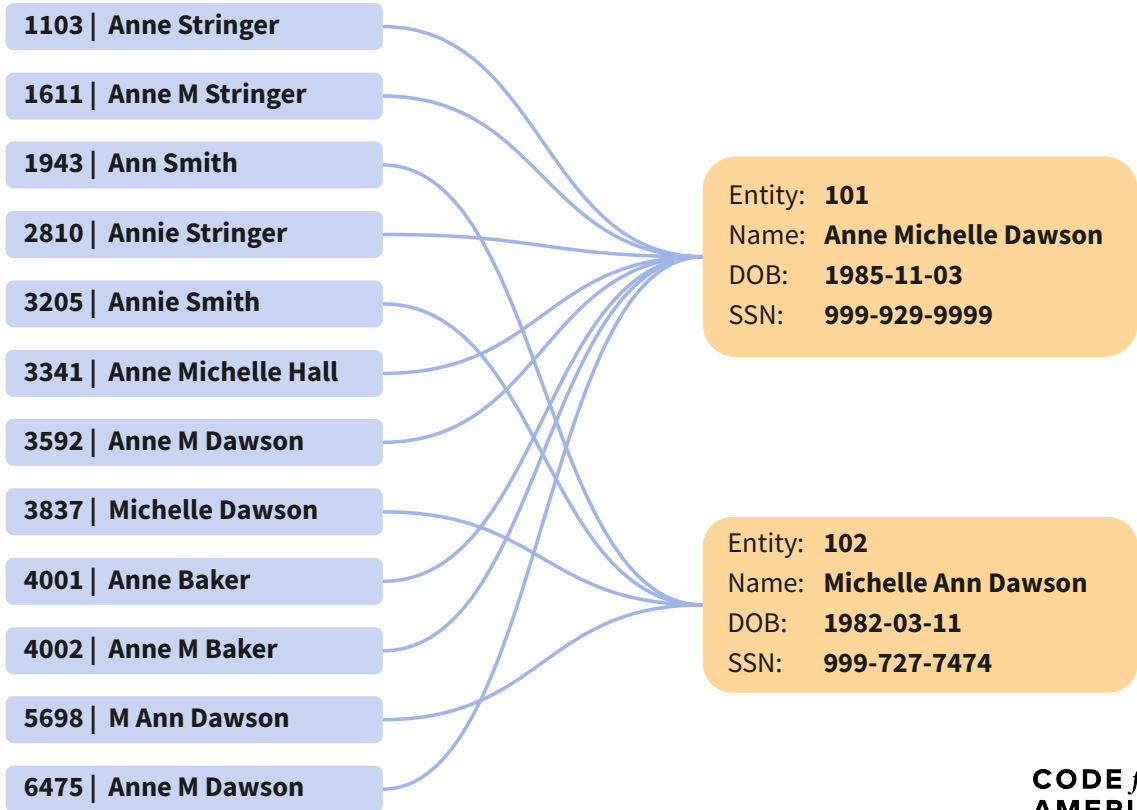
I find it difficult to make confident decisions because of **inconsistent screens and information overload**.

- **Opportunity:** Create a single trusted profile for every applicant.
- **Opportunity:** Construct a complete view of the members of a household.
- **Opportunity:** Link applicants across benefits programs (e.g. SNAP and Medicaid).

Solution: Entity Resolution

What is it?

Entity resolution is a technique for determining when entities (such as people) are the same, despite differences in how they are described or recorded in data.



Applying the Solution: Entity Resolution

Example Application

Use an AI-enabled entity resolution tool to flag relevant data across state systems, so that workers don't miss key documentation, and can have a complete picture of eligibility.

As an eligibility worker

I find it difficult to make confident decisions because of **inconsistent screens and information overload**.

I have to interrupt my work to **look up policy rules in a separate system**.

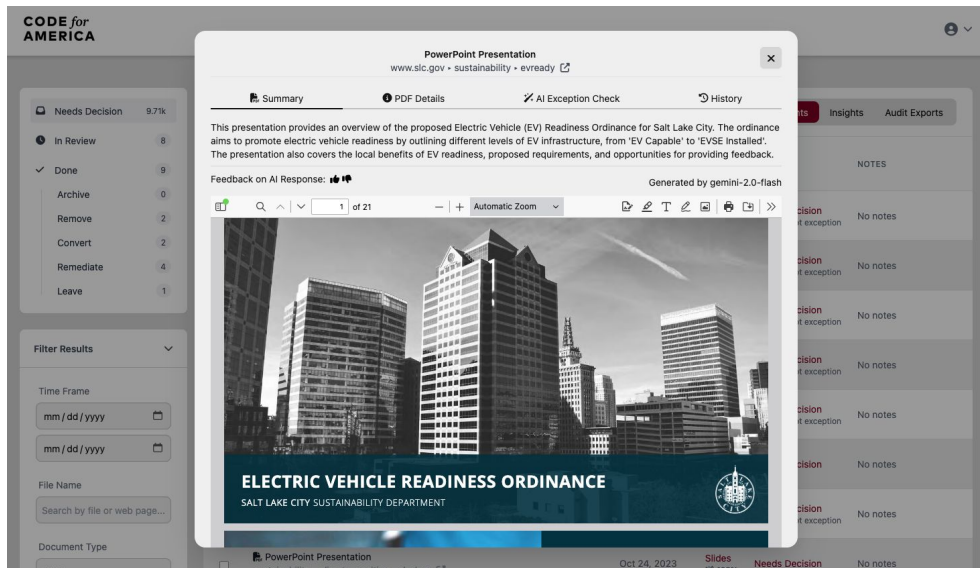
I spend **too much time notating cases** instead of helping people.

→ **Opportunity:** Give caseworkers an at-a-glance summary of case notes and case narratives.

→ **Opportunity:** Summarize relevant policy in easy-to-read training guides for caseworkers.

→ **Opportunity:** Create notices in plain language to provide clear information to enrollees.

Solution: Summarization and Plain Language Translation



What is it?

GenAI and large language models can shorten long documents and create a summary (or subset) of their salient points.

AI can do this much faster than humans on a larger scale.

Applying the Solution: Summarization and Plain Language Translation

Example Application

Use LLMs to provide the following functionality into an existing case management product:

- Produce a case summary based on all of the notes made on the case
- Create an internal chatbot to summarize policy for staff
- Create plain language notices to explain case decisions



Use pilots and proof of concepts to de-risk new AI solutions.

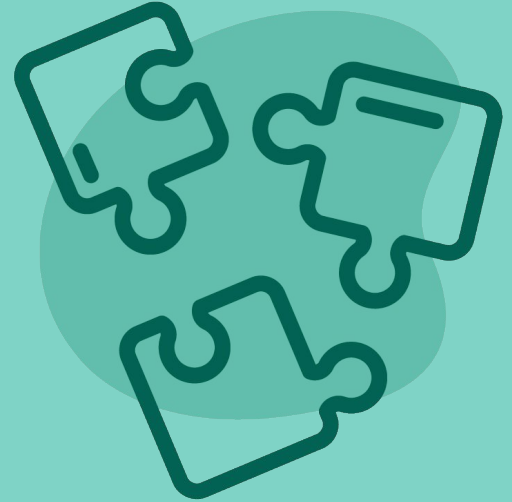
A **pilot** is a small-scale in-production experiment that is used to determine whether a solution could yield benefits in a larger implementation. A **proof of concept** is even smaller - working outside the production context, it will prove the solution is implementable at all.

Asking for pilots or proofs of concept can be an ideal way to ensure that the solution works not only for the average case, but for a specific agency.

Discussion and Q&A



Resources



Resources

Code for America Government AI Landscape Assessment ([webpage](#))



- **Code for America:** HR1 Response / Work Requirements Toolkit ([webpage](#))
- **Center for Civic Futures:** Guide to Evaluating AI Systems for Health and Human Services Agencies ([pdf](#))

Thank you!