

# Integrated Benefits Initiative: Best Practices in Texting

**CODE** *for*  
AMERICA

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## Text Messaging Can Help Government Agencies Reach Clients Efficiently, Especially During Times of Crisis

As governments respond to the COVID-19 pandemic, clear, responsive communication is paramount. Text messaging can supplement existing agency communications efficiently and effectively, by sharing:

- Changes to safety net services policies like eligibility and reporting
- New allowances or programs that existing clients may be eligible for
- Guidance or announcements related to benefits administration

Texting is also a good choice in times of crisis, because it is:

- **Cheap**, at approximately \$0.07 per 100 texts
- **Efficient**, allowing for almost immediate delivery
- **Effective**, offering extremely high delivery rates for clients of all backgrounds

Below, we offer government agencies a general overview of getting started with text messaging for clients and additional resources. We welcome follow-up questions or comments at [integratedbenefits@codeforamerica.org](mailto:integratedbenefits@codeforamerica.org).



## 1. Text Messaging Basics

**Effective Messages:** The goal shouldn't be to send an existing paper form or PDF to a phone, but rather to prioritize essential language that fits the medium. Agencies should gather real user concerns and feedback to guide message development. Messages should:

- Focus on any required client action, the process to complete it, and the deadline.
- Be under 160 characters to ensure they send in the SMS format that works even on non-smartphones. Longer messages risk getting split or undelivered.
- Stay free of jargon and policy references, with links to longer agency resources as appropriate. Links should be short (in case clients need to type them in from a non-smartphone) and tested on mobile devices in advance.
- Use the client's first name, which can improve response rates by nearly 25%.
- Include other means to connect with the agency for follow-up questions, like customer service lines, email inboxes, and office hours as applicable.
- Use a warm, affirming, professional tone.

**One-Way vs. Two-Way Messaging:** Two-way messaging is most effective for meeting client needs. It requires more staff support, but less than you might expect. For example, our SNAP application assister [GetCalFresh.org](https://www.getcalfresh.org) manages an average of 3,500 unique client conversations per week across three languages with two full-time client success staff (averaging roughly 10,000 conversations monthly). If the service is only one-way (the agency will not be responding directly), the agency should develop and initiate an auto-responder to all incoming messages to explain that replies will not be read, and redirect to other resources (similar to a "no-reply" email). The agency should also set-up a recorded message for clients who dial the number that the message comes from.

## 2. How to Get Started

**Tools:** Agencies may already have text message capabilities in their eligibility and case management systems. It may also be possible to quickly adapt an internal or external solution already approved within the government (for example, a child welfare or justice system capability that can be adapted to support safety net services). Finally, states can use off the shelf tools to begin texting quickly. These include:

- [TextIt](#): a commercial solution that offers easy visual campaign flows.
  - [RapidPro](#): The open source solution for TextIt, which requires more technical set-up by the implementing agency.
- [DigiConnect](#): Commercial solution used by several state and local governments.
- [Notify](#): Open source solution developed in the UK that has been successfully adapted by national, state, and local governments worldwide.

**Consent:** Agencies must obtain the client's consent before sending text messages. Agencies may obtain client consent through paper forms, online forms (including within the benefits application portals), at renewal moments, during interviews, or with mail campaigns. We recommend that digital and paper forms for new clients automatically opt clients in to text messaging, and ask clients to indicate if they would like to opt-out. Regardless of form, the opt in or opt out message should:

- Identify the text sender (usually the agency)
- State the general content of future communications
- Mention the frequency of the messages
- Disclose that message and data rates may apply for receiving text messages
- Give clients a means to “opt out” of receiving messages in the future
- Advise the client of any risk associated with the messages, including risk related to HIPAA, including personally identifiable information and protected health information

### Sample Opt-In Language:

[Agency] invites you to receive communications through text messages with important notifications about your benefits. While [state health agency] takes all the proper precautions to safeguard your personal information within its systems, text and photo messages may be read by anyone with access to your phone. If you choose to participate, you will receive up to 5 messages per month. Standard messaging and data rates may apply. Participation is optional, and you may stop the messages at any time by contacting a caseworker or through your online account. Do you want to receive important notifications through text messaging?

**Medium-Term Considerations:** Agencies may understandably focus on sending a few priority messages to as many clients as possible in the short term. There are several considerations to ensure sustainable, client-centered practices over an extended period of time.

- *Link texting to case outcomes.* New communications strategies are a means to an end. States should focus text messages on priority outcomes that clients and caseworkers value, like procedural denials or decision timeliness.
- *Expand from one-way to two-way text messaging.* Two-way messaging creates real-time feedback loops for clients, and helps caseworkers connect on stubborn follow-up items, like document verifications.
- *Secure a short code.* SMS short codes (for example 12345 instead of 1-555-555-5555) have higher deliverability and volume, since they are not subject to carrier filtering or suspension for heavy traffic. The state will need to apply for a short code with wireless carriers (which can take 8–12 weeks).
- *Integrate with case management systems.* Caseworkers should know which messages clients have or have not received, and messages should be linked to other case data (like caseworker notes). This also allows messages to be individualized (like including specific appointment information).
- *Increase message effectiveness with continuous user and A/B testing.* States should use qualitative and quantitative techniques to improve. Messages should be developed and refined alongside real users, while [A/B testing](#) can help states make decisions about language, timing, and cadence of messages.

### 3. Success Story: Text Messaging to Reduce Churn in Louisiana

Code for America's one-way text message pilot delivered timely, specific reminders to clients spanning four distinct safety net programs. Clients overwhelmingly preferred digital notices like text messages, because they always have their phone available, and they can use the message delivery date and time as a record.

As one client put it,

*If you text me phone, I'm able to see it. I always have my phone.*

Another said,

*I love text messages. If I forget what the time was, I don't delete it, I can always reference it.*

Throughout the pilot, we collected data on clients who opted-in compared to a baseline of those who did not opt-in. In every instance, the available data indicates that text reminders improved outcomes related to churn, at times dramatically, including a nearly 80% increase in kept WIC appointments and a 67% increase in successful annual renewals for Medicaid clients. [Read more.](#)

### 4. Other Resources

This brief is not meant to be exhaustive. For more detailed considerations on launching a text message service, reference resources include:

- Center on Budget and Policy Priorities: [Leveraging Text Messaging to Improve Communications in Safety Net Programs](#)
- Code for America: [ClientComm Two-way Text Messaging Pilot Findings](#)
- Alluma, Center on Budget and Policy Priorities, and National WIC Association: [Launching New Digital Tools for WIC Participants](#)

**WIC**  
Supplemental Nutrition Program for Women, Infants & Children

Apply Use Renew

**1 week before appointment**  
1st reminder

Your WIC certification appointment is 11/21 at 9:30 AM. The office is located at 2222 Simon Bolivar Avenue, 2nd Floor. You'll fill out paperwork, talk to a health educator, and get food vouchers. It should take under 2 hours. Bring your child (or proof of pregnancy), your Medicaid card (or other proof of income), and your ID. If you need to reschedule or have questions about what to bring, call xxx-xxx-xxxx .

**1 day before appointment**  
2nd reminder

Your WIC certification appointment is tomorrow at 9:30 AM. The office is located at 2222 Simon Bolivar Avenue, 2nd Floor. Please bring your child, your Medicaid card (or other proof of income), and your ID. If you need to reschedule, call xxx-xxx-xxxx .