



Self-Paced Demo Guide

Interactive Voice Response System Demonstration

Welcome!

Thank you for taking the time to explore our demonstration system. This guide will walk you through an interactive experience designed to showcase how callers can access service information, check eligibility, and connect with care coordinators.

How to explore this demonstration

We've provided [a quick-start](#) guided tour and a more [complete tour](#) that walks through the key questions. The complete tour is a helpful place, if you want more context.

You can interact in either voice or text (note we have two numbers, but we could set it with one number).

Text - (815) 783-5707

Voice - (520) 657-1625

You're also welcome to explore on your own. The system is designed to surface a wide range of questions and use cases, even if it doesn't address every scenario. Both approaches are expected—and useful.

Who You'll Meet (for voice)

Steven - Your narrator who occasionally highlights features and explains what's happening behind the scenes.

Ruth - Your primary guide who walks you through the experience exactly as a client would encounter it.





Quick Demo Path (10 Minutes)

For a streamlined demonstration that showcases the key features, follow this recommended path. This takes approximately 10 minutes and covers eligibility screening, service options, and care coordination.

[Note: If this is your first time interacting with the system it will ask your First and Last Name. If you callback, it will remember the name based on the phone number]

Use these responses at each step for the smoothest demo experience:

1. **At Main Menu say:** "How do I get services"
2. **From service access menu say:** "Eligibility screening"
3. **When asked to confirm say:** "Yes"
4. **Medicaid Eligible -** "Yes"
5. **US Citizen:** "Yes"
6. **PA Resident:** "Yes"
7. **Social Security number:** "Yes"
8. **Are you ready to begin:** "Yes"
9. **Disability:** "No"
10. **Over age 65:** "Yes"
11. **Need daily activities/nursing additional care:** "No"
12. **Married:** "Yes"
13. **Both applying:** "No"
14. **Monthly household income:** "\$700" (to qualify for Medicaid)
15. **After determination say:** "Go to services"
16. **Transfer confirmation:** "Yes"
17. **When asked which service say:** "Care coordination"
18. **Confirmation of Care Coordination:** "Yes"
19. **At care coordination menu say:** "Eligibility Check"
20. **Confirmation of Eligibility:** "Yes"
21. **When you are Ready:** "Let's begin"
22. **Confirm age if asked:** Give an age over 65
23. **Confirm if asked if you have diagnosed disability:** "No"
24. **When offered service types say:** "Senior services"

What You'll Experience

This quick path demonstrates:

- Complete Medicaid eligibility screening with personalized questions
- Automatic eligibility determination based on your responses
- How the system remembers your information across modules
- Service eligibility checking using stored data
- Personalized program recommendations based on your profile





Complete Demo Walkthrough

For those who want to explore all features and pathways, this section provides a comprehensive guide to everything available in the demo system. The options **highlighted in bold** are the recommended path. For each path we have also included links to a *technical guide*, *customer service guide* and in some cases *Additional things to try*.

Technical Service Guide - Provides a more detailed description of what is happening on the backend of the system, with links to some of the source information.

Customer Service Guide - Provides insight as to why it was designed this way and other options that could be included

Additional Things To Try - are alternative answers outside of the recommended path to try.

Main Menu Overview

After introductions, you'll reach the Main Menu, which focuses on three core questions:

- **How do I get services?**
- What services are available?
- What do care coordinators do?

[Technical](#)

[Customer Service](#)

[Additional Things To Try](#)

Path 1: How Do I Get Services

This path provides an overview of the general process for accessing services, then offers three options:

- **Eligibility Screening**
- Service Options
- Talk to a Person

To access Medicaid Screening: Select "Eligibility Screening" and confirm with "Yes."

[Technical](#)

[Customer Service](#)

[Additional Things To Try](#)





Path 1A: Medicaid Eligibility Screening

Ruth will guide you through Medicaid screening questions and record your answers. The system uses intelligent branching logic to ask only relevant questions based on your responses.

Initial Qualifying Questions:

- Are you a US Citizen? **Yes**
- Are you a PA resident? **Yes**
- Do you have a Social Security number? **Yes**

Important: If you answer "No" to any of these questions, Ruth will inform you that you are potentially not eligible for Medicaid and the screening will conclude.

Additional Eligibility Questions (if qualified):

- Do you have a disability? **No**
- Are you over age 65? **Yes**
- Are you between 19 and 64? (Skipped if you answered "Yes" to being over 65)

Note: The system adapts its questions based on your age category.

For seniors and those with disabilities, additional questions include:

- Do you need additional care assistance? **No**
- Are you married? **Yes**
- If married: Are you both applying? **No** (This affects income calculations)

Income Questions:

Ruth will ask for your monthly household income. You can provide any value.

Recommended value - \$700

To qualify for Medicaid in this demo: Provide an income lower than \$989.10 per month. If you're testing the 19-64 pathway, Ruth will also ask about household size.

After the Determination:

Ruth compares your answers to the Medicaid eligibility rubric and informs you whether you are potentially eligible or not eligible. All your responses are saved and will be used to determine program eligibility later in the demo.

You'll then be offered two options:

- Talk to someone
- **Go to Services**

Technical





[Customer Service](#)

[Additional Things To Try](#)

Path 2: Service Options Overview

This section introduces the range of services available and allows you to explore different service categories.

Available Service Areas:

- Behavioral Health (informational only)
- Housing (informational only)
- Food (informational only)
- Transportation (informational only)
- **Care Coordination (full interactive module)**

Note: The first four options provide informational messages and return you to the service menu or offer to connect you with a representative. Care Coordination offers a complete demonstration of the system's capabilities.

[Technical](#)

[Customer Service](#)

[Additional Things To Try](#)

Path 2A: Care Coordination (Recommended)

To access: Say "Care coordination" when asked which service you'd like to learn about.

This module demonstrates the system's ability to remember information, check existing records, and provide personalized service recommendations.

Initial Options:

- Learn about Care Coordination services
- **Check which services you might be eligible for**

Checking Eligibility:

If you choose to check eligibility, Ruth first reviews your records:

- If you completed Medicaid screening: She'll tell you what information is on file and may only need to verify or collect additional details
- If you haven't completed screening: She'll inform you and offer to take you through the Medicaid eligibility check

Ruth may ask up to three additional questions if not already answered:

- Pennsylvania residency - **(if asked - YES)**
- Diagnosed disability **(if asked - NO)**





- Age (**over 65**)

Important: If you indicate that you are not a Pennsylvania resident, Ruth will inform you that you are not eligible for services.

Service Categories:

Based on your profile, Ruth will ask if you want to hear about:

- **Senior Services**
- Disability Services

Ruth will then present the specific programs you may qualify for based on all the information collected throughout your demo session.

[Technical](#)

[Customer Service](#)

[Additional Things To Try](#)

Completing the Demo

After viewing your potential service eligibility, the demonstration concludes. You'll have the option to talk to someone at OverIndexed Solutions if you have questions or would like to discuss implementing a similar system for your organization.

Key Features Demonstrated

Throughout this demo, you'll experience:

- **Caller Recognition:** The system remembers you across calls
- **Intelligent Data Collection:** Questions adapt based on previous answers
- **Seamless Integration:** Information flows between modules without repetition
- **Automated Eligibility:** Real-time determination based on complex criteria
- **Personalized Guidance:** Service recommendations tailored to your profile
- **AI-Based Natural Conversation:** Flexible voice recognition that understands variations

Tips for the Best Experience

- Speak clearly and at a normal pace
- Feel free to try different responses to explore alternate paths
- Call multiple times to see how the system recognizes returning callers
- Take notes on features that interest you for discussion with our team
- Don't hesitate to say "repeat" if you need to hear an option again, or 'start over'





Thank You

We appreciate you taking the time to explore our demonstration system. This interactive experience showcases just a fraction of what's possible with intelligent voice response systems tailored to your organization's unique needs.

Questions or want to learn more?

After completing the demo, simply say you'd like to "talk to someone" and you'll be connected with a member of the OverIndexed Solutions team who can discuss how we can build a customized solution for your organization.

Main Menu

Technical Details

The system uses automatic caller identification to provide a personalized experience. When you call, the platform queries the database using your phone number as the lookup key. If a record exists with your phone number, the system retrieves your stored name and personalizes the greeting accordingly. For first-time callers, the system collects your name during the initial interaction and creates a new database record linked to your phone number, ensuring a seamless experience on all future calls.

Customer Service Design

Name capture at the beginning of the call serves a strategic purpose—it enables personalization throughout the entire system experience. Every subsequent interaction can reference you by name, creating a warmer, more human connection. This approach can be expanded to include other background information such as preferred language, accessibility needs, or case history, allowing for even deeper personalization. The Main Menu is intentionally framed around what Ruth can help you accomplish, using clear, action-oriented language that reduces cognitive load and helps callers quickly identify their needs.

Additional Things To Try

The system is designed to understand natural language variations. If you say "I need help" or "Help me" instead of choosing a specific menu option, Ruth will ask clarifying questions to determine whether you need emergency assistance or want to learn about services. This ensures callers in distress are quickly routed to appropriate resources. Additionally, saying "future options" at the Main Menu unlocks a hidden demonstration path showcasing additional system capabilities and potential future features.





How Do I get Services

Path 1

Technical Details

The system employs robust error handling to ensure callers never feel lost. All menu options that Ruth presents are active and available for selection. If the speech recognition system cannot interpret your response, Ruth will acknowledge that she didn't hear you clearly and offer to return you to the menu. If you decline to return to the menu, the system automatically redirects you to a demonstration of key system features, ensuring the conversation continues productively even when communication breaks down.

Customer Service Design

This module is designed to educate callers about your organization's service access process while guiding them toward actionable next steps. The workflow presented is completely configurable to match your organization's unique intake procedures. While this demonstration uses "Eligibility Screening" as the next step, this could easily be replaced with an initial assessment, comprehensive intake process, appointment scheduling, document collection, or any other workflow that fits your operational model. The key principle is providing clear direction on what Ruth can assist with immediately versus what requires human interaction.

Additional Things To Try

Selecting "Talk to a Person" triggers a transition from Ruth to Steven, who explains the handoff process and provides options for connecting with a live representative. In this demonstration, choosing to connect will actually place a call to someone at OverIndexed Solutions in real-time, showcasing how the system can seamlessly transfer callers to your support team when automated assistance reaches its natural limits or when the caller explicitly requests human help.

Path 1A - Medicaid Eligibility

Technical Details

The system captures and stores all responses in real-time to the same database containing caller name and phone number information. After the initial three qualifying questions, if the caller answers "Yes" to all, Ruth proceeds with additional demographic and household questions, recording each response for future





reference. Once all necessary information is collected, the system executes an eligibility determination algorithm that references federal poverty level tables to compare household income against the appropriate thresholds. The final determination—whether the caller potentially qualifies for Medicaid—is also written to their database record, enabling other modules to access this information without re-asking questions. [Note: We are happy to provide the tables we used for this - please email us info@overindexedsolutions.com]

Customer Service Design

The three initial questions are strategically positioned as a quick qualification filter, respecting the caller's time by identifying ineligibility early rather than collecting extensive information unnecessarily. When a caller answers "No" to any initial question, Ruth clearly explains why they don't meet Medicaid eligibility criteria and offers to navigate them to other system resources. This handoff point could be customized to provide specific alternative resources, referrals to eligibility counselors, or information about other assistance programs.

It's important to note that this demonstration performs preliminary screening, not comprehensive Medicaid eligibility determination. The goal is to collect foundational information and route callers appropriately, allowing your expert staff to focus on complex cases and final determinations. This pre-screening approach can significantly reduce administrative burden and accelerate service delivery.

HIPAA Considerations: This demonstration deliberately avoids collecting specific Protected Health Information (PHI) since this is a demonstration environment and not a real healthcare or social services agency. However, the underlying AWS infrastructure (Amazon Connect, DynamoDB, Lambda) is fully HIPAA-compliant and can be configured to securely capture, encrypt, and store PHI when deployed in a production environment with appropriate Business Associate Agreements in place.

Additional Things To Try

The system adapts its questioning and eligibility calculations based on age and household composition. To explore the alternate pathway for working-age adults, try this sequence: When asked about disability, say "No." When asked if you're over 65, say "No." When Ruth asks if you're between 19-64, say "Yes." The system will then request your household size (try answering "4") and annual income (try "\$35,000"). Notice how Ruth switches from monthly to annual income and uses the MAGI (Modified Adjusted Gross Income) federal poverty level chart instead of the senior/disability chart, demonstrating the system's ability to apply complex, pathway-specific business logic.



Service Options

Path 2

Technical Details

Several service information pathways in this module intentionally omit the "talk to a person" fallback option, demonstrating how self-service informational menus can function independently. This design choice showcases the system's ability to deliver complete, standalone information modules that answer common questions without requiring human intervention. While live transfer capability can be added to any menu point, this architecture allows organizations to strategically determine which interactions benefit from automation versus which require personal assistance. The system can scale from fully automated information delivery to hybrid models based on your operational capacity and service complexity.

Customer Service Design

This menu addresses a common challenge in service navigation: callers often ask "What are my service options?" when they mean either "Tell me what services exist" OR "Tell me what I qualify for"—two distinct needs requiring different workflows. This dual-purpose design accommodates both intentions. The Behavioral Health, Housing, Food, and Transportation pathways provide general educational content about service categories, helping callers understand what's available. Care Coordination, by contrast, offers both informational content AND personalized eligibility checking, demonstrating how different service areas can operate at different levels of sophistication based on organizational priorities and data availability.

Additional Things To Try

Explore the informational service pathways by selecting Behavioral Health, Housing, Food, or Transportation. Notice how these modules provide concise, helpful information and then offer clear next steps—either returning to the service menu or connecting with a representative. To test the system's error handling, try saying something completely unrelated to the menu options Ruth presents (for example, say "I want pizza" or "Tell me about elephants"). Observe how Ruth's default response mode gracefully handles unexpected input, acknowledges the confusion, and guides you back to productive options without making you feel foolish or lost.





Path 2A - Medicaid Eligibility

Technical Details

This module demonstrates intelligent data reuse and conditional logic. When you select eligibility checking, Ruth queries the database to check the Medicaid Eligibility field status—which can be "Yes," "No," or blank (unknown). Based on this value, Ruth tailors her response and determines which questions still need to be asked. For example, if you haven't completed Medicaid screening (field is blank), Ruth will ask if you're a PA resident. If that data already exists from a previous interaction, she'll skip that question entirely and only collect missing information. All responses are recorded to maintain a complete caller profile.

Once Ruth has the necessary data points, she references a comprehensive service eligibility matrix [*tab: Services*] that cross-references caller characteristics against program requirements. When you request Senior Services, the system filters the matrix to display only senior-specific programs, then evaluates your profile against each program's eligibility criteria to determine potential matches. This dynamic lookup approach allows for complex, multi-factor eligibility rules without hardcoding logic for every possible combination.

Customer Service Design

The primary design principle here is "ask once, use everywhere." By maintaining a centralized caller database, Ruth avoids the frustrating experience of repeatedly answering the same questions across different system modules. This respect for the caller's time builds trust and improves user experience. The eligibility output is intentionally positioned as preliminary guidance rather than definitive determination—the goal is to equip callers with actionable information they can bring to their conversation with agency staff. This approach acknowledges that eligibility determination often involves nuance, documentation review, and professional judgment that automation should support but not replace.

Additional Things To Try

To observe the system's adaptive questioning logic, navigate directly to Care Coordination without completing the Medicaid Eligibility screening first. Notice which questions Ruth asks when she has no prior information versus which questions she skips when data already exists. You can also explore the disability services pathway: when asked about having a disability, say "Yes," then choose to look up Disability Services. Compare the programs presented for disability services versus senior services to see how the eligibility matrix adapts recommendations based on different caller profiles.

