

# Eligibility Copilot — Pilot Brief

*A structured, low-risk pilot framework for agency evaluation of AI-assisted benefits intake.*

## THE PROBLEM

Public benefits agencies face persistent operational pressure across three dimensions simultaneously: caseworker capacity constraints, inconsistency in eligibility determinations across workers and offices, and increasing documentation and compliance obligations. Existing tools address fragments of this — document management here, workflow routing there — but rarely close the loop from document intake to auditable determination with human oversight built in.

Eligibility Copilot addresses the full operational loop: structured document extraction, multi-program rules application, human review and override, and automatic governance documentation — in a single accountable workflow.

## PROPOSED PILOT WORKFLOW

### Phase 1: Scoping (Weeks 1–2)

Hentex meets with agency program and IT leads to define the specific use case, data environment, applicable programs, and governance requirements. A written pilot design document is produced and approved before any deployment proceeds.

### Phase 2: Controlled Deployment (Weeks 3–8)

Eligibility Copilot is deployed alongside existing workflows — not replacing them. A defined cohort of caseworkers uses both systems in parallel on a defined case type. Participation is voluntary and no agency system integrations are required for initial deployment.

### Phase 3: Data Collection (Ongoing during Phase 2)

System automatically collects AI recommendation accuracy data, override rates, caseworker feedback, processing time comparison, and parity metrics across demographic dimensions.

### Phase 4: Evaluation & Report (Weeks 9–10)

Hentex delivers a structured pilot evaluation report covering accuracy analysis, override patterns, caseworker experience findings, governance artifact quality review, and recommended path forward.

## PILOT STRUCTURE

Duration	10 weeks (2-week scoping + 8-week parallel deployment)
Scope	Single program type recommended for initial pilot (e.g., SNAP intake)
Participants	5–15 caseworkers; participation voluntary
Data Requirements	No PII required for scoping; test data set or de-identified cases for deployment
Integration Required	None for initial pilot — standalone parallel workflow
Agency Commitment	Program lead point of contact; 2 hours scoping; participant recruitment
Cost to Agency	No cost for initial scoping; pilot structure defined jointly

## EXPECTED OUTCOMES

- Measurable reduction in per-case processing time for enrolled caseworkers
- Consistency improvement in determination recommendations across workers
- Complete audit trail for every case processed during the pilot period
- Governance documentation package including AIA draft and OMB inventory entries
- Parity analysis across English and Spanish-language cases processed
- Structured evaluation report supporting internal go/no-go decision
- Clear procurement pathway recommendation based on pilot findings

## **IMPLEMENTATION APPROACH**

Hentex follows a discipline of written pilot design before deployment. Every pilot begins with a scoping session and a written design document that the agency reviews and approves. Scope, data handling, success criteria, and exit conditions are defined in writing before any system access is granted. This approach protects the agency, ensures accountability, and produces a defensible evaluation record.

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