MANAGING A SUCCESSFUL INTEGRATED ELIGIBILITY PROJECT

The availability of federal 90/10 technology funds is prompting many states to replace their eligibility management systems for health and human services (HHS) programs. But creating a single eligibility system that integrates the data, processes and user experience of such widely different programs is a huge undertaking. Some states are contracting with a system integration firm to manage the project, while other states are performing the project management role themselves.

At First Data, we believe that for both of these choices, it's important to understand how certain building blocks of roles and activities can make for a smoother project and optimize the work of vendor and internal teams.

Project Management Office.

Given the scope and complexity of an integrated eligibility system, it's essential to have a single team to manage and coordinate all aspects of the development and launch activity. The project management office may be staffed by the system integrator, an external vendor, agency IT staff or a combined team with representatives of multiple stakeholders.

Strategic Planning.

Developing a common vision and measurable objectives with executive sponsors is paramount for an integrated system project. A clear and cohesive strategic plan provides the guiding principles for tactical decision-making throughout the life cycle of the project.

Program Governance.

Formal plans, committees and activities for project governance help clarify roles and responsibilities, reduce issues and simplify decision-making.

Grant Funding.

The scope and intricacy of an integrated eligibility system require maximizing federal and state funding and developing a cost allocation for the programs the system supports.

Business Process Reengineering.

Planning a new integrated eligibility system offers an ideal opportunity to identify how current business processes can better meet the agency’s objectives for operational efficiency and quality of client service delivery. Through tools such as a MITA 3.0 State Self-Assessment, agencies can analyze their current business and information and technology architectures, and lay the foundation for future growth and strategic direction.

Procurement Support.

Developing multiple program requirements to ensure the RFP meets federal and state requirements, as well as business needs, is vital for an integrated eligibility system. Having the proper resources in place to support the procurement process, facilitate the proposal response and negotiate the contract will help agencies choose the right vendor to build the right system.

Organizational Change Management.

An integrated eligibility system has far-reaching impact on work activities and responsibilities for employees. A formal change management effort identifies those impacts, as well as needed user training, documentation and communications.

Deliverable Reviews.

Going beyond a simple confirmation that vendors have delivered what was promised, a deliverable review monitors the quality of the system as well as associated development processes, testing and reporting.

Transition Management.

Creating a transition board and a formal transition plan helps prepare the organization for the activities of moving from the old system to the new.

Ongoing Operations Reviews.

After the “go live” date for the new integrated eligibility system, the data collected in operations reviews identifies issues such as case review errors, accuracy of training materials and work instructions, and metrics for operational activities.
Independent Verification and Validation. Implementing a new eligibility system using 90/10 technology funds will require system certification and adherence to federal guidelines. Ensuring independent verification and validation (IV&V) provides an unbiased perspective on the system’s development integrity and functionality.

Although any of these building blocks can help an agency manage a system development project more effectively, they have the most impact when an agency applies them all.

LESSONS FROM INDIANA

The Indiana Family and Social Services Administration (FSSA) began its journey to an integrated eligibility system for clients receiving all core agency services in 2013 as the agency prepared to serve citizens under the Affordable Care Act (ACA).

“It’s great to have a different set of eyes and a different perspective giving us feedback to help us make sure we’re meeting federal requirements.”

– Sunshine Beam, Deputy Director of Eligibility Systems, Indiana Division of Family Resources

Indiana FSSA manages the development project for the new system with a small internal team that includes several employees who are knowledgeable about the agency’s business operations. First Data supports the team in an IV&V role for the new system, building on its experience in an operations verification and validation (OV&V) role for the agency’s existing eligibility system.

The IV&V activity encompasses monitoring the system vendor’s design, development and testing work, as well as compliance with federal requirements.

“It’s great to have a different set of eyes and a different perspective giving us feedback to help us make sure we’re meeting federal requirements,” says Sunshine Beam, deputy director of eligibility systems, Division of Family Resources and project manager for the new system.

The new integrated eligibility software replaces three separate systems. Beam notes that although most tasks will be easier under the integrated system, employee training is still essential. Before Indiana begins formal user training sessions, the team presents demos through webinars and in-person seminars to familiarize employees with the new system’s capabilities and user interface.

“We will implement these upfront sessions so that when staff walk into the training session it isn’t the first time they are seeing the system,” says Beam.

The quality of testing has been another area of intense focus. First Data is helping the agency review the integration testing scenarios submitted by the system integrator, which will resolve many issues and improve testing quality before the system enters the formal user acceptance test.

A COMPLEX PROJECT, POSITIONED FOR SUCCESS

Developing and launching an integrated eligibility system is a major IT project that has wide-reaching impact on an agency. Giving careful consideration to the building blocks described — and making strategic use of experienced consultants for key activities — increases the likelihood of project success and maximizes the benefits to be gained from a state-of-the-art eligibility management system.

First Data Government Solutions has helped states across the country in planning, implementing and operating modern CSE programs. To learn more about how our experienced team can support your efforts, please contact:

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