Subject: NC FAST Project 2&6 Preparations

Dear County Director of Social Services:

We want to share important information regarding the Project 2&6 version of NC FAST. Project 2&6 brings significant enhancements to the functionality present in the current version of the system (i.e., Project 1 – Global Case Management and Food and Nutrition Services). These system enhancements will drive significant changes to how counties manage their eligibility business processes and allocate staff among eligibility-related job functions. Before reviewing a few key system enhancements, it is important to present the Project 2&6 timeline including key milestones and upcoming Work Support Strategies (WSS) events and products that will provide significant assistance with implementation.

Upcoming Schedule

- **Work Support Strategies (WSS)** – The implementation of Project 2&6 of NC FAST coincides with the second year of the WSS grant. In preparation for both of these activities, WSS is:
  - Conducting a series of town hall meetings across the state in late winter designed to share ideas from counties who have made substantial improvements in how they deliver services and solicit input from county staff.
  - Developing a webinar series designed to provide strategies around business process redesign that will begin in January.
  - Utilizing the county champion concept to drive change at the worker/supervisor level in counties and keep local staff abreast of WSS products and events.
  - Distributing and providing information on utilizing the WSS Practice Model.
  - Disseminating a county self-assessment in conjunction with the NC FAST Change Discussion Guide that will supplement the work of the WSS Practice Model and provide an opportunity for counties to assess their ability to implement NC FAST and make substantial changes to improve efficiency and customer service locally.

For additional information on WSS, updates, and strategies for counties, please visit the WSS website at [http://www.ncwss.com/](http://www.ncwss.com/)

- **Foundation Workshops** – The project team is exploring conducting a series of workshops in late March through May 2013 for supervisors, lead workers, and county champions. The purpose of these workshops is to expose county leaders to upcoming NC FAST enhancements and provide an opportunity to develop concrete action plans for the upcoming deployment of Project 2&6.

- **Project 2&6 Pilot Milestone** – Project 2&6 functionality is scheduled to go into pilot on Monday, June 17, 2013. Three counties have been identified as Project 2&6 primary pilots.

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Location: 3724 National Drive • Camden Building • Raleigh, NC 27612
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(i.e., Johnston, Orange, and Chatham). All 13 Project 2&6 pilot counties will actively participate in pilot activities including job task analysis, training material reviews, and testing. The go-live dates for the remaining Project 2&6 pilot counties will be front-loaded in the Project 2&6 Soft Launch schedule.

It is important to note that since NC FAST is one statewide system, all 100 counties will see screen changes once Project 2&6 enhancements go into production for pilot on June 17, 2013. Web-based distance learning will be provided to non-pilot counties in the weeks leading up to pilot implementation covering screen changes (primarily affecting evidence screens). The project team is exploring specific options for how new Project 2&6 system functions can be restricted for non-pilot county staff until they receive Soft Launch training. Further information will be provided to the counties once an approach has been defined.

- **Soft Launch** – Similar to Project 1, the NC FAST team anticipates deploying Project 2&6 in a Soft Launch mode where a limited number of application types are entered into the system to allow staff to become familiar with the processing of cases in the system. Soft Launch will extend from late July 2013 through late September 2013. The specific schedule for Soft Launching NC FAST across the state is in development but will use a geographically-based model similar to the one used on Project 1.

- **Health Benefit Exchange Milestone** – North Carolina citizens can apply for health insurance in any county DSS office starting on October 1, 2013, under provisions of the Affordable Care Act. Prior to October 1, all Medicaid and Work First staff will be trained to process Health Benefit Exchange applications as part of the Soft Launch process.

- **Hard Launch** – EIS data will be converted to NC FAST between October 2013 and January 2014. Unlike Project 1, there will be no Hard Launch – Stage 1 due to case processing considerations present with EIS.

### Core NC FAST Project 2&6 Design Considerations

Project 2&6 system enhancements are based on several “pillars” that are central to the design of the system. These design pillars have significant implications for how counties organize and manage their operations. Each county should carefully consider how your eligibility programs are managed and supported in light of these important design considerations.

- **Reception** – All 100 North Carolina counties must utilize NC FAST Reception functionality with the deployment of Project 2&6. The reason is that Reception functionality is used to capture client contacts to meet mandatory federal Medicaid reporting requirements. Once Project 2&6 is deployed, counties should consider suspending further use of county-level Reception work management systems unless a compelling rationale for their continued use can be defined.

- **Case Routing and Work Queues** – Once a transaction (e.g., application, change in circumstance, etc.) is recorded in Reception, the Reception worker must either assign the resulting task to a specific worker or a work queue to move it along in the process.

- **Task Utilization** – Tasks will be central to the way work is managed in NC FAST. For Project 2&6, a significant number of system generated tasks will inform the worker of required case actions and are the sole method for communicating these required actions. These tasks are sent to the specified case owner and the case owner alone. This will result in an ongoing need for each worker to check and work system generated tasks in NC FAST.

- **Universal Worker** – The case structure of NC FAST is based on an Integrated Case (IC) with one or more Product Delivery Cases (PDCs) underneath. For Project 1, there was one IC with one PDC underneath for the FNS case. In Project 2&6, there will be multiple PDCs
under most cases (e.g., FNS, Medicaid, Work First, SA, etc.). All evidence will be managed at the Integrated Case level. The implication is that updates made to evidence at the IC level (e.g., income changes) will automatically ripple across all PDCs under that case in accordance with policy rules. While the system does support assigning PDCs to different workers, the management of evidence at the IC level drives the need to adopt a Universal Worker model for most ongoing case management.

- **Long Term Care (LTC) and Adult Care Homes** – The exception to the above Universal Worker consideration is LTC and Adult Care Homes cases since they do not have multiple PDCs under an IC. Counties may consider keeping workers supporting ongoing case management of these programs in separate units.

- **Security Roles** – Security roles will encompass all eligibility programs. When Project 2&6 is implemented, there will be security roles for Eligibility Workers, Eligibility Supervisors, etc. which is consistent with the approach used for Project 1. There will not be security roles specific to each program (e.g., Medicaid Eligibility Worker, FNS Eligibility Worker, etc.). The implication is that Eligibility Workers can maintain case data in NC FAST across all eligibility programs.

- **Document Management** – Project 2&6 will support the direct attachment of image files to evidence records. Images will be stored in a central repository that will be available to all counties. Counties will need to determine to what extent they wish to take advantage of this functionality.

**Recommended County Actions**

In light of the project timeline and core system design considerations, counties must begin to make preparations for deployment of Project 2&6 functionality and adoption of Work Support Strategies recommendations. Suggested high-level activities include:

- Exposing existing Medicaid and Work First staff to FNS work.
- Considering cycling Medicaid and Work First new hires through FNS units to give them exposure to NC FAST and then transitioning them back to support Medicaid and Work First cases once Project 2&6 is implemented.
- Cross-training staff on policies and concepts for all eligibility programs.
- Beginning to consider organizational changes that support transition to a Universal Worker business model including:
  - Establishing a common intake unit across all programs.
  - Establishing multi-disciplinary teams to support caseloads so staff have ready access to workers and supervisors with knowledge across all programs.
  - Defining a strategy for potentially reassigning cases to align with new organization structure.
  - Considering potential job classification updates in light of new organizational structure and work assignments.
  - Considering any physical changes that may need to be made to your DSS office space to integrate different program areas and streamline Reception.
- Participating in NC FAST Project 2&6 testing activities to gain early exposure to NC FAST processing. Contact your assigned County Readiness Liaison for more information if you are interested in exploring this option.
- Ensuring Medicaid and Work First vacancies are filled and any existing case backlogs are being actively managed to get and keep caseloads current.
- Beginning to plan for computer and network upgrades, if necessary. Note: System specifications for Project 2&6 are expected to be identical to Project 1.
- Considering establishing a budget for overtime and temp staff to support conversion processing for Project 2&6. The specific Project 2&6 conversion strategy is being finalized.
Additional information will be shared with counties as soon as it is available.

- Reconsidering the need to purchase county document management systems. Counties will need scanners to capture the document images for attachment in NC FAST, if they wish to take advantage of the new document management functionality in NC FAST.
- Considering the long-term need for county-level systems to support the Reception function.
- Attend Work Support Strategies Town Hall meetings in late winter 2013 (dates/locations to be determined – watch for updates).
- Send county representatives to Leadership Summit in early March 2013.
- Visit the Work Support Strategies website at: http://www.ncwss.com/

The Project 2&6 version of NC FAST has been designed and is in active development. Testing will begin in early 2013. We look forward to showing various system functions to you as soon as they are available to help make the design considerations discussed earlier in this letter clearer to you. We did not wish to hold off on sharing these design considerations as we appreciate the significant impact the system will have on each county and the advanced planning required to prepare for these changes.

We look forward to working with each county to help prepare for implementation of Project 2&6. We will share additional information about Project 2&6 functionality as it becomes available. In the meantime, should you have any questions or concerns, please do not hesitate to contact me.

Sincerely,

Anthony Vellucci

cc: Beth Melcher, NC DHHS, Deputy Secretary for Health Services
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    Dan Stewart, NC DHHS, Assistant Secretary for Finance and Business Operations
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