Automation Communication

The Eligibility Automation Project Newsletter

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Phase III of the Eligibility Automation Project

Steve Fisher, Project Manager

In this edition, we will focus on Phase III, which features Self Service Applications:

- Using the Internet, Applicants will be provided with an option to utilize self service for their case.
- Applicants will be required to enter specific identifying data into the system to ensure they are authorized to access their case file information.
- Once the Applicant passes the security authorization check, they will be provided with a full array of their case information.
- As part of this phase, the Applicants case information will be provided in read-only mode and will not be available for modification.

Thank you for taking the time to read our newsletter.

Taking a Look at Washington State's Best Automation Processes

Barbara Clark, Program Lead

On October 22, 2009, Steve Fisher and I were dispatched to Tacoma, Washington, to meet with their Division of Social and Health Services staff to observe and discuss their division's best practices as they relate to document imaging and business workflows. What we discovered by far exceeded our expectations!

The automation tools and processes we are currently developing for implementation here in Nevada have been in practice in Washington DSHS offices for the past five years. Not only do they have the document imaging process down to a science, but they are operating a "paperless" case file system and ***same day*** benefit approvals as well. Their customer information is saved to "virtual" computer case file which is very similar to the one we have envisioned here and are in the process of developing for our agency. These best practices have resulted in *significantly improved* business efficiencies, customer service and employee morale. This trip not only validated our current path, but was also a preview of the relief that will be coming to our ranks when our automation project goes live. For more on the Washington Division of Social and Health Services, you can visit http://dhsh.wa.gov . Check it out for a glimpse into the future!

What is the Eligibility Automation Project?

- Better customer service through an online application process including document imaging and improved workflow

Why are we doing it?

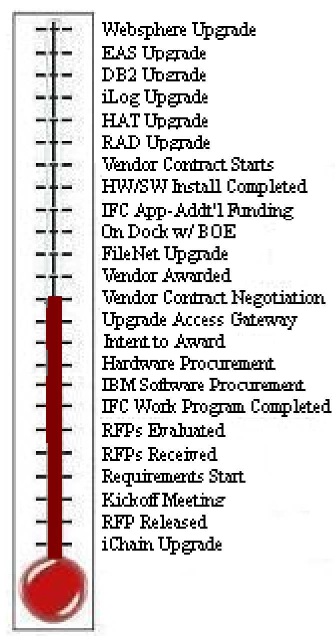
- To more efficiently handle increased workloads due to the current economic climate

What do we expect to gain from it?

- Increased efficiency and effectiveness of the eligibility caseworker for TANF, SNAP and Medicaid programs by 30 %
- Improved client experience
- Reduced foot traffic in the offices
- Reduced caseworker data entry time as well as minimized potential for data entry errors
- Reduced phone calls

Inside this issue:

Planning Phase Progress Meter



Exciting Opportunities and Possibilities for DWSS

Dave Stewart, Deputy Administrator, Information Systems

If you go to any of our larger offices, you will see long lines of customers waiting to be helped. If you place a call to Customer Service, the lines are busy and you should be prepared to wait for a while until you are served.
This is not a reflection on DWSS employees, it is just the plain and simple truth that there are just not enough trained employees to meet the current service demand.

During the agency's budget preparation and subsequent 2009 Legislative Session, Program/Field Operations and Information Systems were tasked with how to address this problem and it was determined that, in order to just keep up with the increased caseload projections, the Division would have to add at least two more large offices, hire and train 500+ new caseworkers and support personnel. This approach was not practical for several reasons.

First, Barbara Clark and her training crew could not get people through the new hire academies fast enough to have a direct impact on the field offices in the next two years. As you well know, it takes a lot of time and training to become an effective caseworker.

Second, new facilities cannot be staffed with all new hires. It is important to have a mix of existing and new staff located in all of our offices in order to maintain the effectiveness of the existing offices and improve our ability to respond to rising caseloads.

Lastly, the cost of this approach was just unacceptable.

The question was then asked "What can the Division do to accommodate the increased caseload while minimizing the need for additional staff?" Out of this, the Technology Initiative was born.

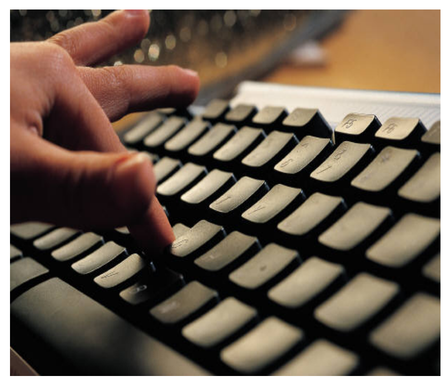
The centerpiece of the Technology Initiative is Access Nevada, a web-enabled application that will allow a client to complete a public assistance application online for a DWSS worker to review.

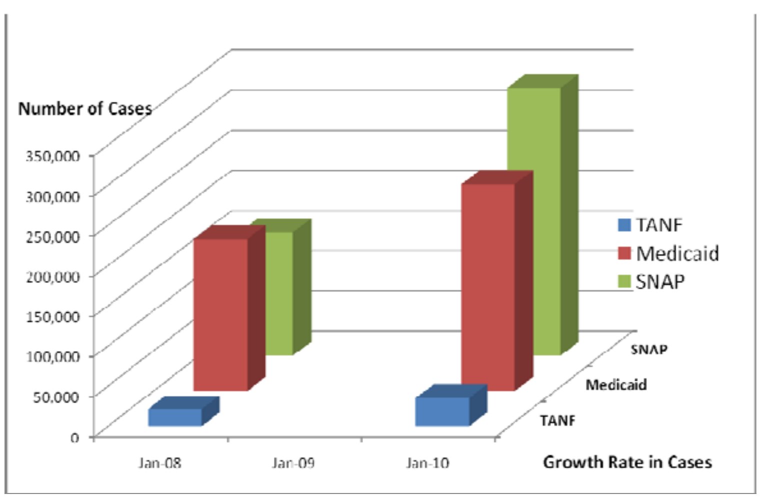
A customer self-service module utilizing the Internet is now being developed to accomplish the following objectives:

- Using the Internet, applicants will be provided with an option to self service their case.
- Applicants will be required to enter specific information to ensure they are authorized to access the information.
- Once the Applicant passes the security authorization check they will be provided with a full array of their case information.
- Applicants' case information will be provided in read-only mode.

The main purpose of this phase of the Technology Initiative is to decrease the foot traffic in the District Offices. If a client is able to check the status of their case, update basic information such as phone number and address changes, the system will keep clients from waiting in long lines out of the lobby and off the phone to the Customer Service Unit.

I, personally, am very excited about the many opportunities the Technology Initiative presents the Division as we work together to serve our clientele in the present challenging times and the possibilities the initiative brings us all in the future for streamlining business processes, increasing productivity and enhancing the services we provide to those who need our help.





The Planning Phase Process

Laura Jenkins, Chief, Requirements, Testing and Training

PROJECT INITIATION

At DWSS, project initiation often begins with the completion of a Program Request form, which is submitted to the appropriate program chief for their consideration and approval. If approved, the goal and scope of the project is then documented on an Executive Summary Form and submitted to the administrator or deputy administrator by the program chief for their consideration and sponsorship. The executive committee meets on a regular basis to determine which projects should move forward based on a number of factors including the agency's needs, funding, and resource availability. This now launches the project into the Planning Phase.

PROJECT PLANNING

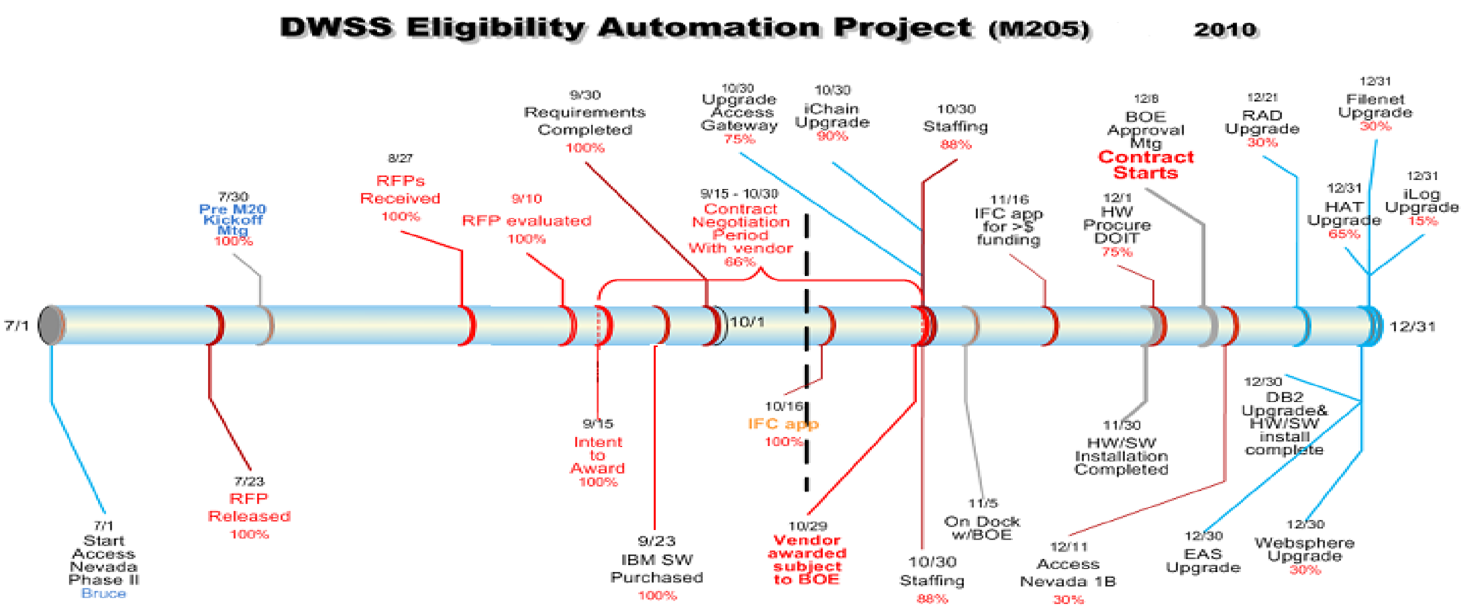
Project planning is the most critical phase of the System Development Life Cycle (SDLC) as well as the Project Life Cycle. Careful planning, particularly in the first stages of a project, is necessary to coordinate activities and manage project risks effectively. The depth and formality of project plans should be commensurate with the characteristics and risks of a given project. The planning is focused towards an official Project Kickoff Meeting where the results of the planning are communicated to all of the project stakeholders.

Stakeholder Analysis—Prior to the Kickoff Meeting, the project manager needs to conduct a stakeholder analysis. Stakeholders include the project sponsor, the project manager, the project team members, and everyone who has an interest in the outcome of the project. The focus of the analysis is to determine from each stakeholder how the project will impact their area and what they consider are the factors for success.

Roles and Responsibilities—During the planning phase the responsibilities of key personnel, including project sponsors, managers, subject matter experts, third-party vendors and internal audit, security, and network personnel are defined. The focus of this area is to determine the major deliverables and who owns the responsibility for making sure that the deliverables are achieved. These deliverables will be reflected in the project schedule.

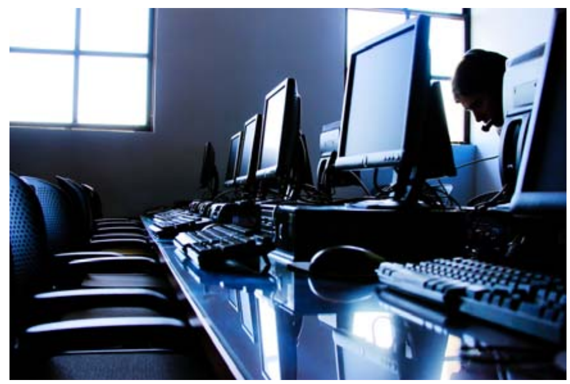
Scheduling—The project manager identifies and schedules major project phases as well as the task, deliverables and milestones to be completed within each phase. Estimating who long each task will take is critical to the accuracy of the project plan. Assigning resources along with the task duration will determine the amount of work over a period of time. The next aspect of assigning work is to show any relationship between tasks or other projects where there exist dependencies. Scheduling needs to reflect a dynamic fluid process. As the schedule changes, the project plan needs to reflect accurately the current status.

After the Planning Phase, the project moves into the Design Phase. This phase will produce technical specification requirements from the System Requirements Document (SRD) and will include how to build, test, and integrate the product or services through to completion.



Pilot Offices for Eligibility Automation

Carson City
6,200 On-Going Case Files



Henderson
16,800 On-Going Case Files

Reno
24,000 On-Going Case Files

Flamingo
24,500 On-Going Case Files