County Engagement and Rollout Approach

September 12, 2024

Topics

- Overview of PATH NC

- County Engagement

- County Rollout & Groupings

- Timeline and Sample Calendaring

Guiding Principles

Safety and well-being of children, families, and NC Child Welfare staff are of the greatest importance

Create a system that is **easy and intuitive to use** and efficiently manages **data** and **documents**.

Create a system that child welfare workers can access and **use 24/7 from a broad set of supported devices**.

Whenever possible, **data should only be entered once** and used many times.

Ongoing **training** and **support** for the model of practice, the system, and changes will be **aligned** to **maximize the quality** of service provided.

County and state representatives must be partners and active participants committed to reach consensus at every step of the process

Counties vary in size, complexity, and available resources. While any system will require some standardization, we must build a system that works for all counties.

Why a Statewide Child Welfare Information System is needed

- A successful statewide child welfare technology system is needed to:
    1. Help child welfare workers plan and deliver the services necessary to protect and support children and families
    2. Ensure consistent data throughout the life of child welfare services to drive transparency, accountability, and to improve outcomes

- Provide real time (or close to real time) information, data, decision-support, and oversight capabilities to child welfare staff, supervisors and leadership at the local and state level

- Families move between counties. Ensuring timely and reliable data is available to social workers in a statewide system will help better protect children and social workers in the field.

- Many counties don't have enough child welfare workers. With the large caseloads that creates, social workers need an efficient and user-friendly system so they can spend as much time as possible working with families, and minimal time entering and reentering information or navigating a complicated user interface that is not aligned with child welfare practice.

Overview of PATH NC

- PATH NC will provide county, state, and certain contributing agency staff with electronic decision-support tools and electronic forms to help them manage the work of child welfare across all required functions.

- Includes modules for CPS Intake, CPS Assessments, CPS In-Home Services, Foster Care, Financials, Eligibility (IV-E & FFPSA), Foster Home Recruitment and Licensing, and Adoption (including Adoption Assistance).

- The platform will have a user-friendly interface (with mobile-friendly and off-line capabilities) that will minimize staff time spent doing documentation and maximize the time spent in the field with children and families

- Reporting, dashboarding, and analytics will provide staff and management at all levels with enhanced oversight and ensure compliance with federal mandates such as the Child and Family Services Review (CFSR), Title IV-E, and required federal reporting.

- Interfaces with internal systems (such as Medicaid) and external agencies (such as the Department of Public Instruction) will enable the automated sharing of information collected by non-child welfare staff that may have impacts on the safety and well-being of children involved with child welfare

PATH NC Capabilities, Supports, and Services

Cross-Functional Capabilities

- Person Search, Match, and Registration (CNDS Integration)
- Reports, Dashboards, Analytics
- Content Management (Taxonomy for Documents, Audio, and Video)
- Mobile App with Offline Sync
- Global Search with Dynamic Free Text Capabilities
- Provider and Family Portals
- Chat bots for policy questions and case discovery
- External Interfaces with NC Medicaid, Department of Public Instruction, and other contributing partners over time
- Structured Decision-Making (SDM) tools and other practice model supports
- Dynamic custom case prints with ability to redact

Supports and Services

- Readiness, Training (Virtual & Instructor-Led), and Ongoing Self-Paced Web-Based Trainings (WBTs)
- Help Desk Support
- Data and document conversion from state and local county systems
- Responsive Development Team to make ongoing system changes and improvements
- Digital-First Communications Hub (DFC) with audience targeting and surveys

PATH NC County Engagement Overview

County engagement and feedback is imperative to the development and design of the new technology for NC Child Welfare, PATH NC. This slide deck provides an overview of county engagement, feedback, and next steps/outcomes to improve the PATH NC system.

WE CONNECTED...	WE FACILIATED...	WE COLLECTED...	WE ENGAGED...
85+	**250+**	**350+**	**590+**
Counties	Engagement Opportunities*	Total Data Points	State and County Staff

Positive Feedback
Standout attributes and functionalities of the PATH NC system that are highly regarded by engaged stakeholders

Access to Support Materials
"I really appreciate the notes section as well as the desk guide."

Automation of Information
"I like the direction this functionality is going."

Intuitive Case Design
"Clicking to case and click new was easy. Once you are in the case the hyperlinks Member/Plans/Case Related Forms etc. are straightforward."

Opportunities for Enhancement
Potential areas identified through county engagement and feedback that can be improved or optimized in the PATH NC system.

Navigational Improvements
"Would like to see the save options on all the pages as universal but has seen different versions of Save on several of the pages."

Field and Data Entry Improvements
"The ease of entry can lead to data entry mistakes. High level items may need a 2nd level of security."

Data Autofill Consistency
"Would be great to easily populate the address of one participant to another without retyping it."

Engagement opportunities include Refinement Meetings, Requirement Confirmation Meetings, Discovery Sessions, County and Technology Interviews, County Site Visits, Exploratory Testing, and the PATH NC Exploration Center at SSI

Map of Engaged Counties

Counties engaged represent a balanced representation from various county and office sizes, new and experienced staff, and system or paper-based case management experience.
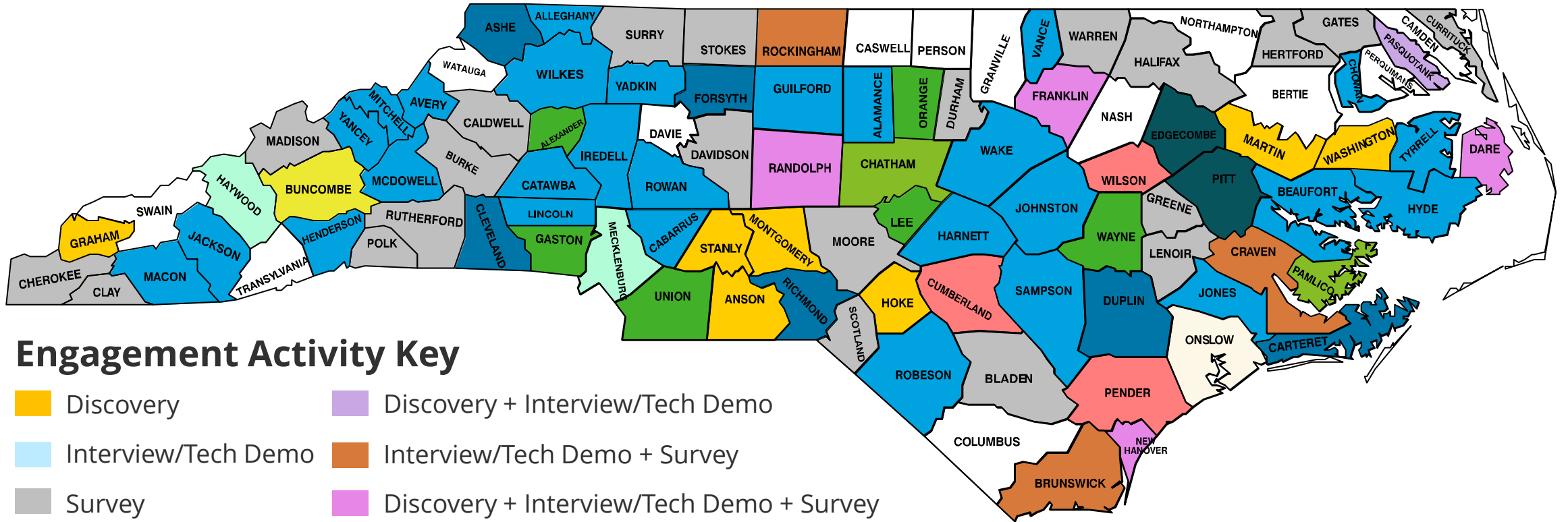
Engagement Activity Key

- 🟧 Discovery
- 🟦 Interview/Tech Demo
- ⬜ Survey
- ⬛ Exploration Center
- 🟩 Site Visit + Survey
- 🟦 Survey + Discovery
- 🟪 Discovery + Interview/Tech Demo
- 🟧 Interview/Tech Demo + Survey
- 🟪 Discovery + Interview/Tech Demo + Survey
- 🟩 Discovery + Site Visit + Survey
- 🟦 Survey + Exploration Center
- ⬜ Site Visit + Survey + Exploration Center
- 🟦 Survey + Discovery + Exploration Center
- 🟥 Interview/Tech Demo + Survey + Exploration Center
- 🟨 Discovery + Interview/Tech Demo + Survey + Exploration Center

County Rollout Approach

The county rollout approach is based on the following framework:

Pilot-led grouped implementation

Deployment of PATH NC will be delivered in strategic waves to encourage and sustain use and understanding, including an initial pilot:

- **I&A Group 1:** The 14 counties currently utilizing Cúram for I&A only will pilot PATH NC for I&A**.**
  - ***Benefits:*** Lead the way for the I&A implementation, leveraging the experience with previous I&A rollouts; receive extended post-implementation functional and technical support; provide feedback on readiness, training, and implementation support to enhance subsequent rollouts.

- **I&A Group 7/Ongoing Group 1:** The 11 counties currently utilizing Cúram for Intake, Assessment, and Ongoing Case Management will be the first and only group to implement all functionalities at one time.
  - ***Benefits:*** Lead the way for the Ongoing Case Management implementation, leveraging the experience with previous Ongoing Case Management rollouts; reduced time spent working in separate systems, preventing the creation of temporary business processes; increased preparation time to fully transition from Cúram to PATH NC.

Extended post-implementation window following Pilot Go-Live

The extended post-implementation window allows the Pilot counties to validate the efficiency and effectiveness of the system prior to the rollout to the remaining rollout groups.

County Groupings for I&A Rollout
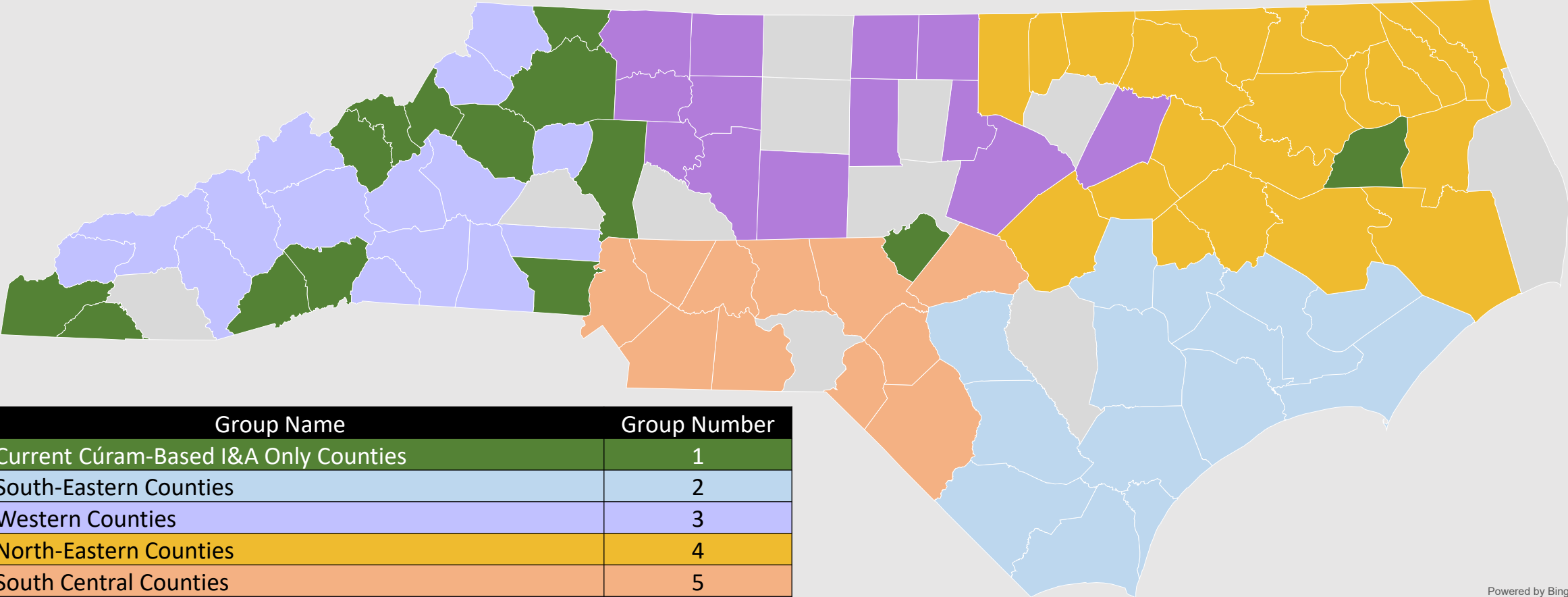
Group Name	Group Number
1 – Current Cúram-Based I&A Only Counties	1
2 – South-Eastern Counties	2
3 – Western Counties	3
4 – North-Eastern Counties	4
5 – South Central Counties	5
6 – North Central Counties	6
I&A Group 7 / Ongoing Group 1 - 11 Cúram CWIS Counties	7*

*Note: The 11 counties currently using the full functionality in the CWIS will rollout both I&A and Ongoing in PATH NC, as Group 7 for I&A and Group 1 (Pilot Group) for Ongoing.

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I&A Group 1 – Active CWIS I&A Counties (Group 2 for Ongoing)

Alleghany
Avery
Caldwell
Cherokee
Clay
Gaston
Henderson

Iredell
Lee
Mitchell
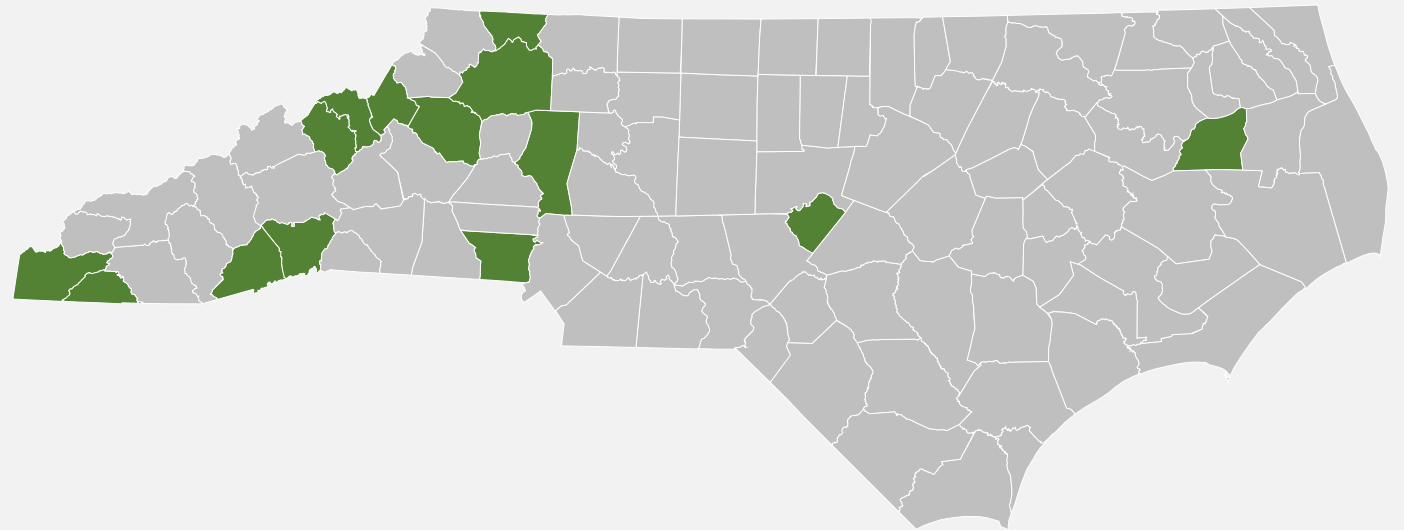Transylvania
Washington
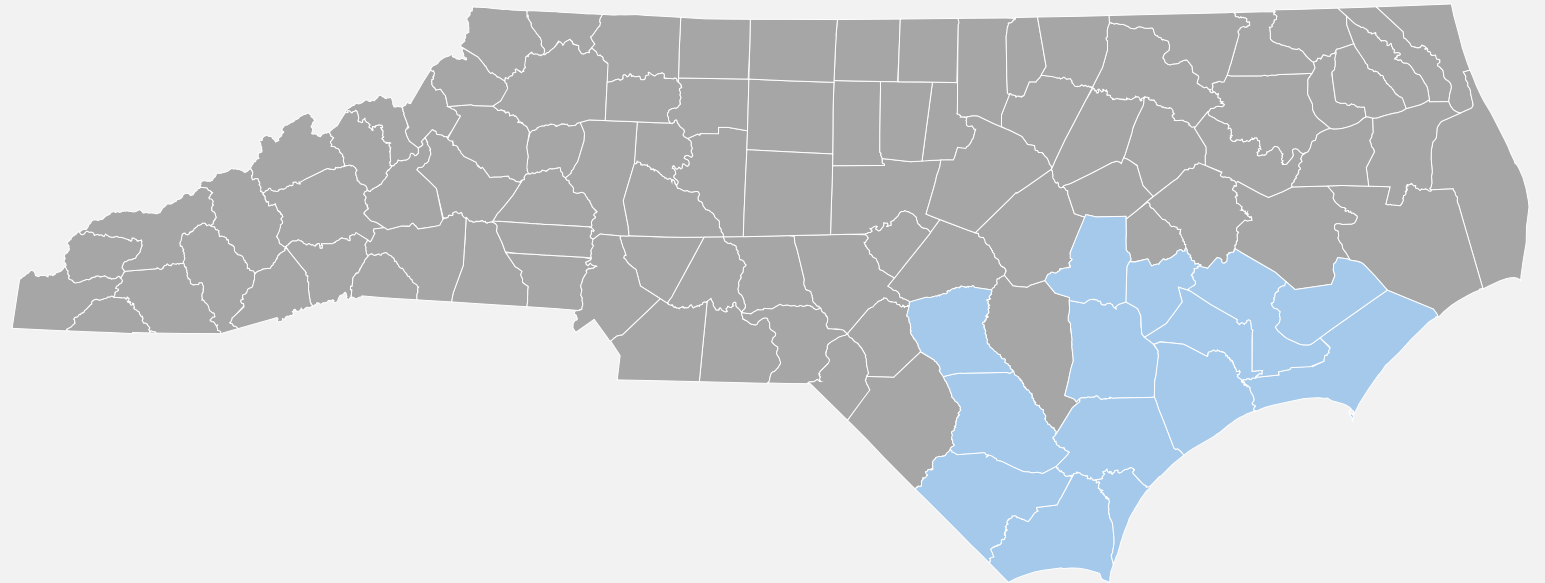Wilkes
Yancey

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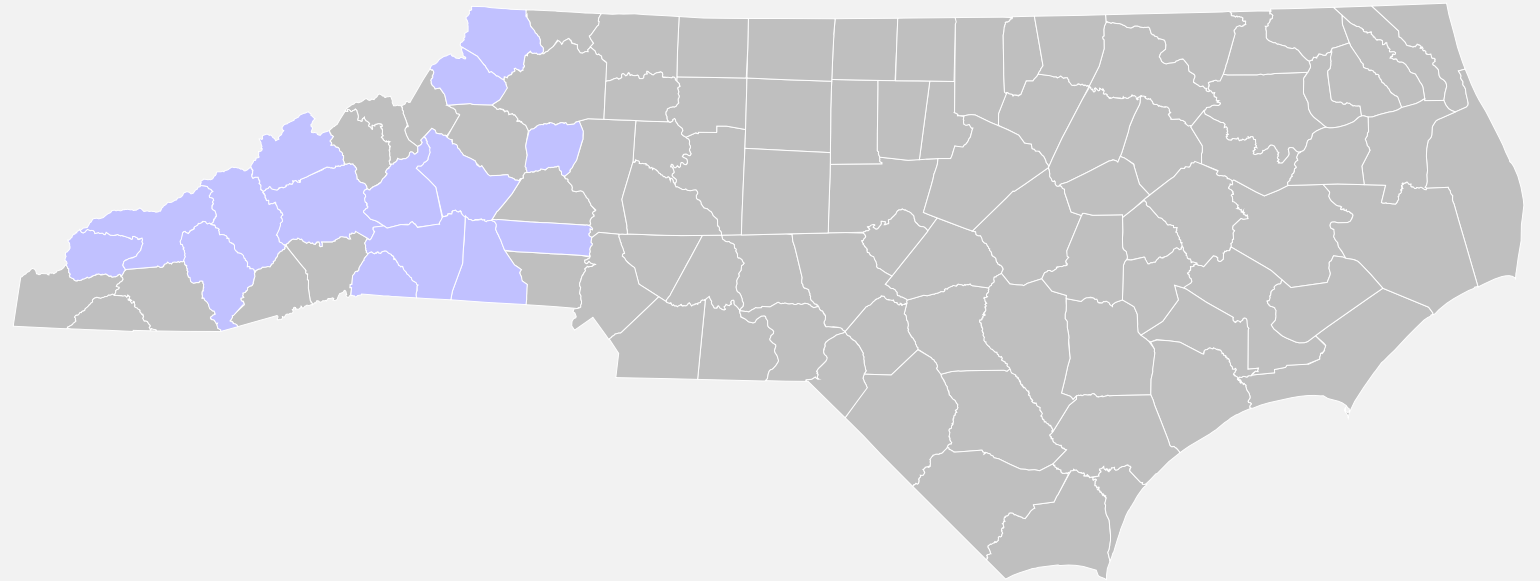© GeoNames

I&A Group 2 – South-Eastern Counties (Group 3 for Ongoing)

Bladen
Brunswick
Carteret
Columbus
Craven
Cumberland
Duplin
Jones
Lenoir
New Hanover
Onslow
Pamlico
Pender
Wayne

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I&A Group 3 – Western Counties (Group 4 for Ongoing)

Alexander
Ashe
Buncombe
Burke
Cleveland
Graham
Haywood
Jackson
Lincoln
Madison
McDowell
Polk
Rutherford
Swain
Watauga

I&A Group 4 – North-Eastern Counties (Group 5 for Ongoing)

Beaufort

Bertie

Camden

Chowan

Currituck

Edgecombe

Gates

Granville

Greene

Halifax

Hertford

Hyde

Johnston

Martin

Nash

Northampton

Pasquotank

Perquimans

Pitt

Tyrrell

Vance

Warren

Wilson

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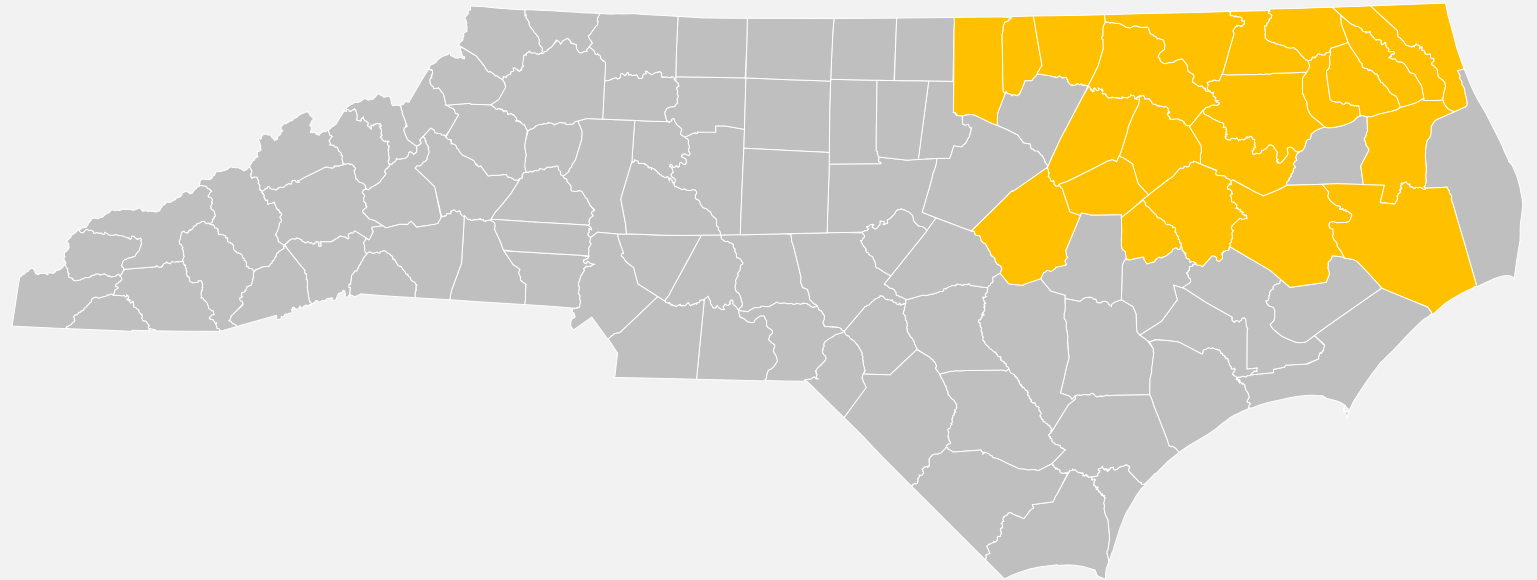
I&A Group 5 – South-Central Counties (Group 6 for Ongoing)

Anson

Cabarrus

Harnett

Hoke

Mecklenburg

Montgomery

Moore

Robeson

Scotland

Stanly

Union
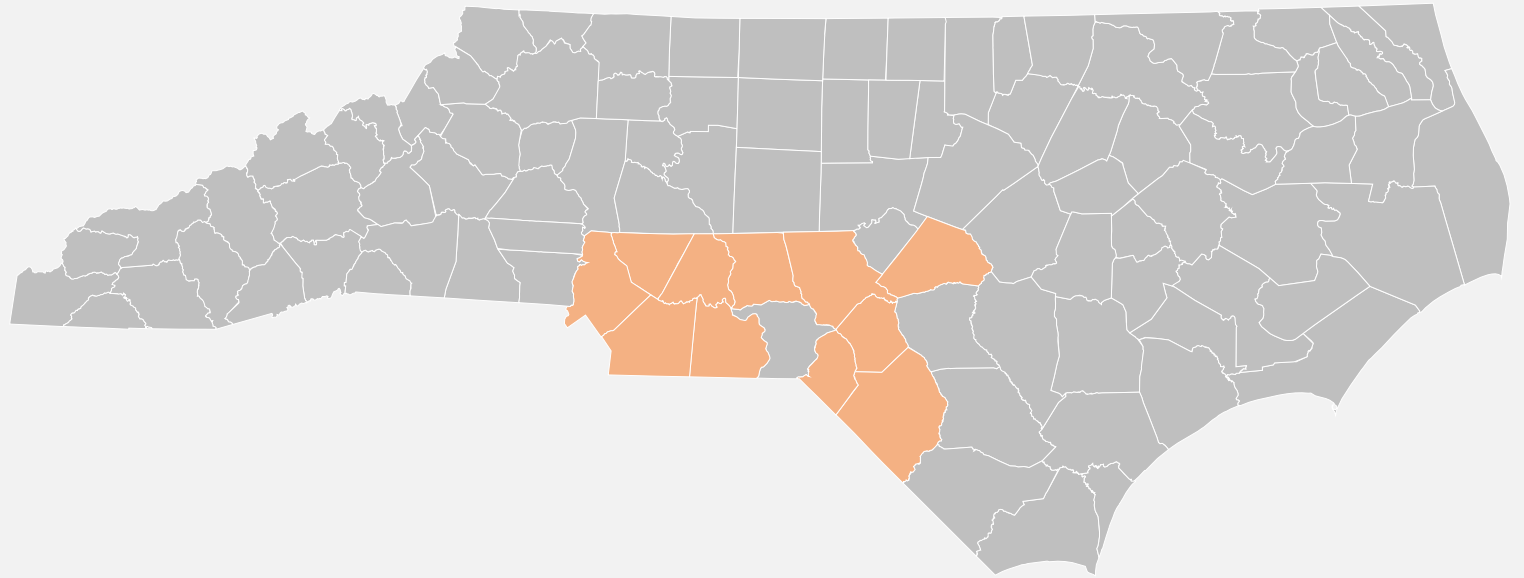
I&A Group 6 – North-Central Counties (Group 7 for Ongoing)

Wake
Forsyth
Person
Alamance
Durham
Stokes
Randolph
Surry
Caswell
Davie
Yadkin
Davidson

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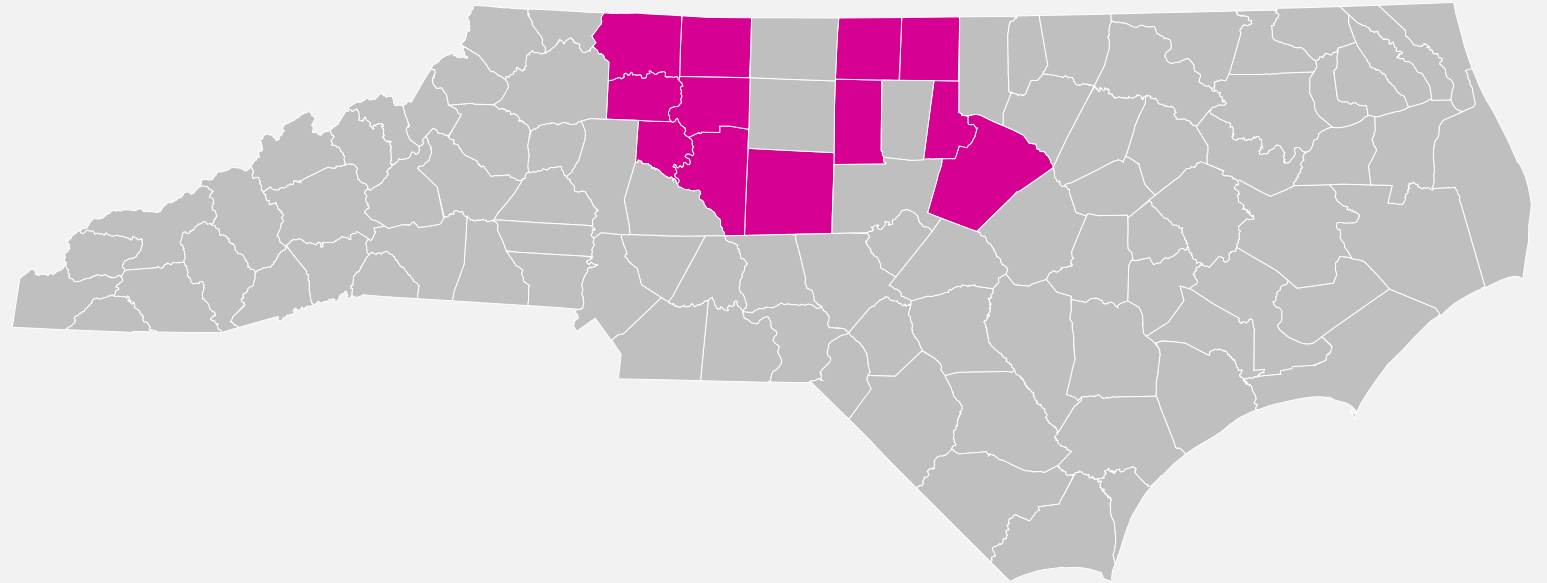
I&A Group 7 – Original CWIS Pilots (Group 1 for Ongoing)

Catawba
Chatham
Dare
Franklin
Guilford
Macon
Orange
Richmond
Rockingham
Rowan
Sampson

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7
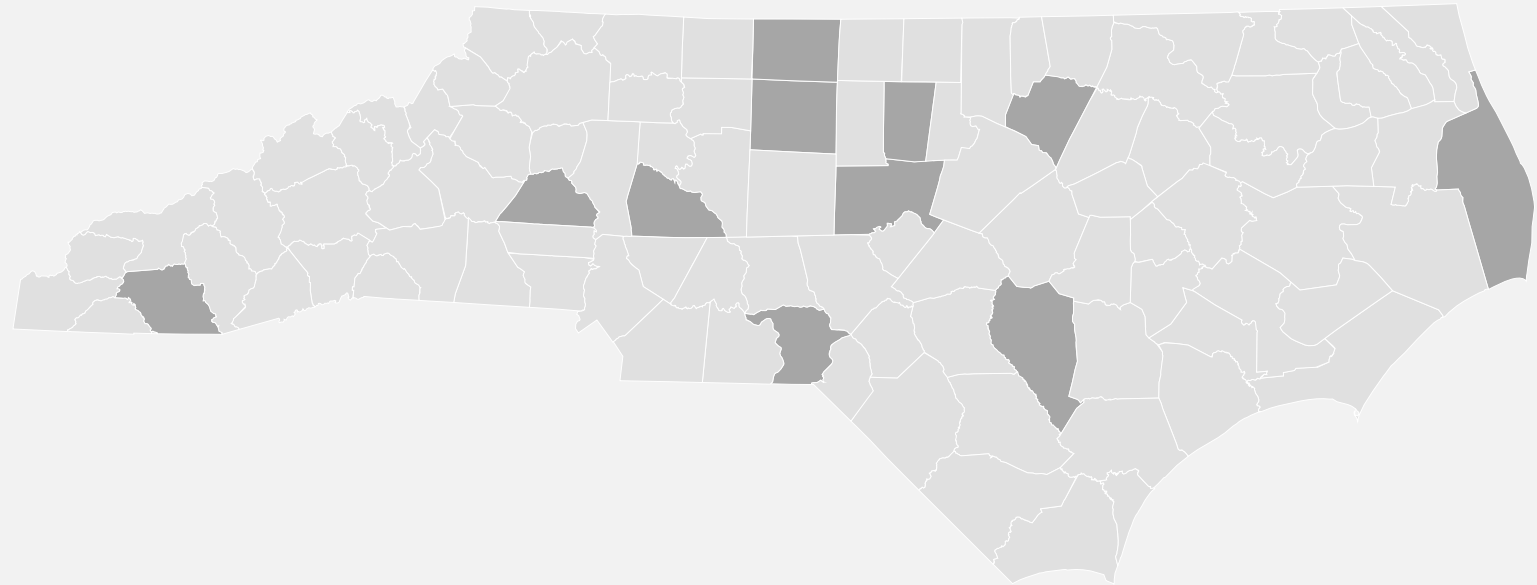
PATH NC Timeline (Mar' 24 to Jul' 25)

2024 | **2025**

MAR APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG

Ongoing Case Mgmt.

PI1: S1 S2 S3 S4
PI2: S5 S6 S7 S8
PI3: S9 S10 S11 S12
PI4: S13 S14 S15 S16
UAT

I&A

PI1: S1 S2
PI2: S3 S4 S5 S6
PI3: S7 S8 S9
UAT
TTT, END USER TRAINING (EUT), GO-LIVES, POST IMPL. SUPPORT

We are here

I&A Milestones

10/30 11/11 12/30

3/3 — R1
4/14 — R2
5/12 — R3
6/9 — R4
7/7 — R5
8/4 — R6

R1, R2 etc. represent the Go-Live Dates. Readiness and Training will occur leading up to those dates

PATH NC Timeline (Aug' 25 to Jun' 26)
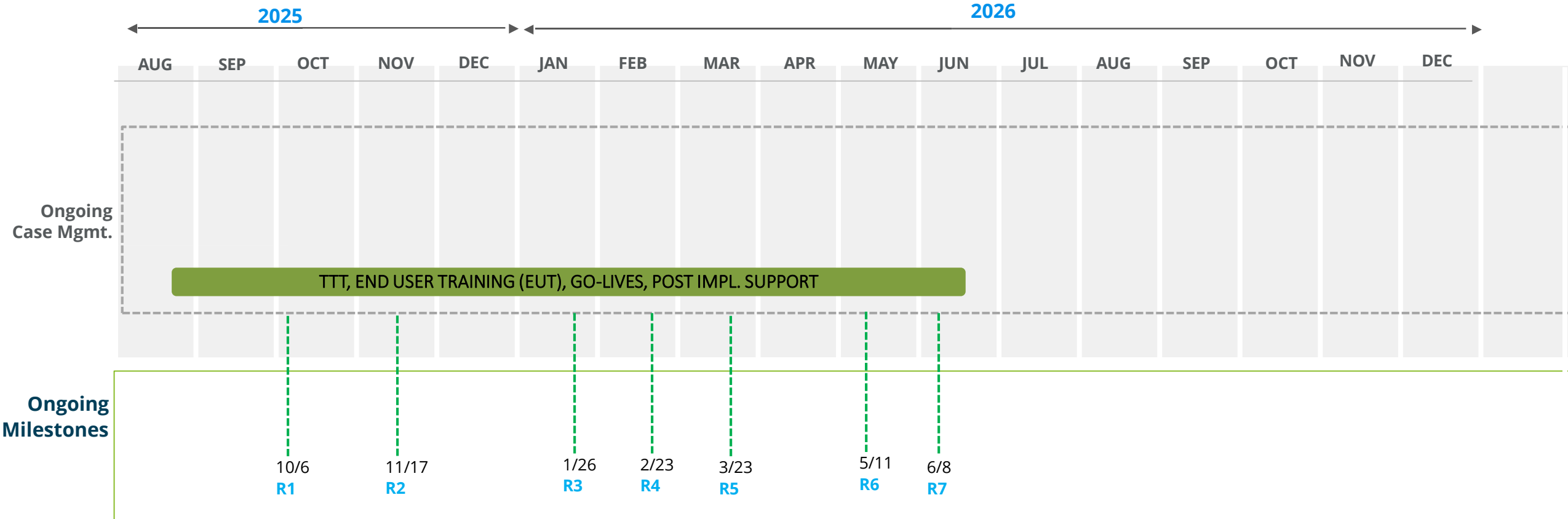
2025

2026

| AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |

Ongoing Case Mgmt.

TTT, END USER TRAINING (EUT), GO-LIVES, POST IMPL. SUPPORT

Ongoing Milestones

10/6
R1

11/17
R2

1/26
R3

2/23
R4

3/23
R5

5/11
R6

6/8
R7

R1, R2 etc. represent the Go-Live Dates. Readiness and Training will occur leading up to those dates

Intake & Assessment Rollout Activities

Planned rollout activities allow for wraparound county support and the opportunity to validate the efficiency and effectiveness of PATH NC before rolling out to the remaining groups post-Group 1.

6 Weeks
Activities conducted between I&A Rollout Group 1 and Group 2

4 Weeks
Activities conducted between all other Rollout Groups after I&A Group 2

Activities

- **OCM/Readiness:** 60-Day and 30-Day Readiness Assessments, Final Readiness Checklists, and Post-Implementation Surveys are conducted to measure and track readiness for implementation.
- **Training/Deployment:** Policy and system training provided through web-based and instructor-led training; training evaluations; training environment availability for practice and environment refreshes; updates to training materials, if needed.
- **Application Development:** Hotfixes are immediate fixes for critical issues impacting a large user base, including data fixes. Bug Fixes are regular updates for non-critical bugs and data fixes. Enhancements are continuous improvements driven by user feedback.
- **Technical and Conversion:** Cutover, Data Conversion, Smoke Testing, and System Performance Tracking support the transition to the new PATH NC platform.

Key Considerations

- **Discovery and Requirement Validation:** PATH NC development is informed by child welfare policy, collaboration with DHHS SMEs, and insights/feedback from county stakeholders.
- **Exploratory Testing:** In-depth feedback has been provided by county stakeholders through Exploratory Testing, so we do not anticipate major process or system changes post go-live.
- **System Maturity:** PATH NC platforms are consistent and flexible, allowing for enhancements and defects to be addressed more effectively and efficiently.

Implementation Support

- **Digital-First Communications:** Centralized communication platform for the PATH NC Implementation Team to easily communicate with counties.
- **Navigator:** In-system support to answer common questions and support PATH NC navigation.
- **Functional & Technical Support:** Roaming On-Site Support and Help Desk support provided after each rollout to resolve county questions and troubleshoot potential system issues.

I&A Rollout Activities Calendar – 6 Weeks

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Group 1 Go-Live 3	4	5	6	7
	Hypercare – Defect Fixes & Enhancements				
	Group 1 - End User Training Delivery Evaluation				
	Group 1 - Post-Implementation Communications & On-Site Support				
Week 2	10	11	12	13	14
	Hypercare – Defect Fixes & Enhancements				
	Group 1 - Update Training Approach/Materials				
	Group 1 - Post-Implementation Communications & On-Site Support				
Week 3	17	18	19	20	21
	Hypercare – Defect Fixes & Enhancements				
	Group 1 - Update Training Approach/Materials				
	Group 1 Post-Implementation Survey				
Week 4	24	25	26	27	28
	Hypercare – Defect Fixes & Enhancements				
	Group 2 - End User Training Preparation				
					Training Environment Validate/Refresh

Note: Help Desk support will be available beginning at Go-Live and throughout the duration of all subsequent rollouts.

Legend:
- OCM/Readiness
- Training/Deployment
- Application Development
- Technical and Conversion

I&A Rollout Activities Calendar

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 5	31	01	02	03	04
	Hypercare – Defect Fixes & Enhancements				
	Group 2 - On-Site Support Preparation				
	Group 2 - End User Training Delivery				
	Group 2 Final Readiness Checklist				Training Environment Validate/Refresh
Week 6	07	08	09	10	11
	Hypercare – Defect Fixes & Enhancements				
	Group 2 - On-Site Support Preparation				
	Group 2 - End User Training Delivery				
					Cutover & Conversion*
					Smoke Testing*

*Cutover & Conversion and Smoke Testing activities will occur over the weekend.

Legend: OCM/Readiness | Training & Deployment | Application Development | Technical and Conversion

I&A Rollout Activities Calendar Example – 4 Weeks

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	**Group 2 Go-Live:**				
	Hypercare – Defect Fixes & Enhancements				
	Group 2 - Post-Implementation Communications & On-Site Support				
Week 2					
	Hypercare – Defect Fixes & Enhancements				
	Group 2 - Update Training Approach/Materials				
	Group 2 - Post-Implementation Communications & On-Site Support				
	Group 3 - End User Training Preparation				Training Environment Validate/Refresh
Week 3					
	Hypercare – Defect Fixes & Enhancements				
	Group 3 - On-Site Support Preparation				
	Group 3 - End User Training Delivery				
	Group 2 Post-Implementation Survey				
	Group 3 Final Readiness Checklist				Training Environment Validate/Refresh
Week 4					
	Hypercare – Defect Fixes & Enhancements				
	Group 3 - End User Training Delivery				
					Cutover & Conversion*
					Smoke Testing*

*Cutover & Conversion and Smoke Testing activities will occur over the weekend.

Legend:
- OCM/Readiness
- Training/Deployment
- Application Development
- Technical and Conversion

Questions