

NC FAST Case Management Scope Analysis

This document provides information concerning the scope of NC FAST in order for counties to assess current and future technological, business, and administrative needs.

The web-based NC FAST Case Management application will be a comprehensive case management solution that features real-time sharing of client and case information across program and county lines.

Program Areas Include:

- Services
 - Adult and Family Services
 - Child Welfare
- Economic Benefits
 - Child Care
 - Energy Assistance (Crisis Intervention Program (CIP) and Low Income Energy Assistance Program (LIEAP))
 - Food and Nutrition Services (FNS)
 - Medicaid
 - Refugee Assistance
 - Special Assistance
 - Work First (TANF)

Note: Program area functionality is planned to be released in 18 to 24-month increments. Currently, FNS, LIEAP and TANF Data Collection are planned to be included in the first release.

Functionality of NC FAST Case Management:

- Reception
 - Registration and demographics
 - Notification to worker that client is waiting
- Calendaring
 - Schedule appointments
 - Maintain calendars
 - Capture and display work lists for staff
 - Export vCal to county calendar systems
- Client Search
 - Create client/ID assignment
 - Find existing clients
 - Query with multiple search criteria

Functionality of NC FAST Case Management (continued):

- Manage Relationships
 - Within a case
 - Among multiple cases
- Income Support Screening
 - Screening tool for workers to determine potential eligibility for clients
- Worker Notification (Alerts/Ticklers)
 - Notify one or more staff members of agency, policy, or case-related information
- Security
 - Authenticate through NCID
 - Authorize by roles
 - Administer roles and permissions to users
 - Assign contact information for counties
- Narratives
 - Create automatically
 - Create manually
 - Query
- Waiting Lists
 - Create
 - Update
 - Query
- Electronic Forms and Notices Management
 - Forms and notices available on demand
 - Query historical forms and notices with multiple search criteria
- Interview Process (Application, Change, Review)
 - Display interview questions by program area
 - Display previous answers to interview questions
 - Create case units
 - Intelligent scripting (includes/excludes questions based on responses to previous questions)
 - Single point of data entry with data made available across programs
- Administrative Functionality
 - Define and maintain date-driven business rules engine
 - Define and maintain business workflows
 - Process mass changes
- Case Disposition
 - Determine/re-determine eligibility based on program specific rules
 - Linked display of policy reason(s) for ineligibility
 - Case termination
 - Case re-opening

Functionality of NC FAST Case Management (continued):

- Case Maintenance
 - Notification to workers when change in client's information
 - Forms on hold functionality
- Case Transfers
 - Worker-to-Worker
 - County-to-County
 - Program Category-to-Program Category
 - Mass reassignments
- Issuance of Benefits
 - Automatic issuances
 - Manual issuances
- Queries/Ad-Hoc Reporting
 - Create reports and show results
- Supervisor Functionality
 - Workload management
 - Administrative functionality for calendars, tasks, and workloads for multiple workers
- Provider Functionality
 - Portal for providers and/or external stakeholders
- Financials (Client Payment, Auditing, Control Reporting)
 - Audit financial transactions and separation of duties
 - Maintain and display confirmation of benefit delivery
 - Maintain and display benefit status
 - Maintain and display historical records of benefits issues for all program areas
- Assessments and Service Plans
 - Structured intake tool
 - Service plans
 - Assessment tools
- Documentation
 - Business Process Flows
 - User Guides
 - Linked Access to Rules and Policies
- Technical
 - Counties may invoke SOAP web services of case management functionality.
 - Web pages will be US Section 508 and American Disabilities Act (ADA) compliant.

Further County Considerations for the NC FAST Case Management Solution:

- Consider purchasing Microsoft Word 2000+ to make full integrated use of this solution.
- Case files can store and retrieve electronic documents.
 - This is not a document management application.
 - Consider purchasing scanners to make full integrated use of this solution.
- The application is web-based.
 - Consider the number of workstations needed for your staff.
 - Consider the amount of internet bandwidth needed.
- Due to current Policy and Procedures, Electronic Signatures is out of scope. This may be included as an enhancement as policy changes.
- Migration of county data into the case management data model is out of scope.