



# Conducting the MITA SS-A

Step 1: Preparing for the SS-A: Lessons Learned and  
Best Practices



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### Introduction

This white paper is the first in a series that will expand upon the information contained in the SS-A Companion Guide and provide useful tips to assist states in conducting a MITA SS-A.

### The problem

Conducting a Medicaid Information Technology (MITA) State Self-Assessment (SSA) can be a challenging task. The MITA 3.0 Framework provides an SS-A Companion Guide to assist states with planning and conducting the MITA SS-A, but it does not contain details of best practices or lessons learned from other states that have already completed an assessment. Now that the Centers for Medicare & Medicaid Services (CMS) expects all states to complete/update the MITA SS-A within 12 months of the release of the MITA Framework 3.0 and submit the SS-A as part of the Advance Planning Document (APD) process, it will become more critical for states to leverage best practices and lessons learned from other MITA SS-A projects.

### SS-A Companion Guide Step 1: Prepare for SS-A Project

The first step in the SS-A Companion guide is to Prepare for the SS-A Project. It lists the steps, description, recommended staffing, and MITA Framework reference documents. Many of the steps provide high level information about the planning activities a state needs to perform prior to conducting the SS-A, such as submitting the Planning Advance Planning Document (PAPD), identifying the project team, and developing project management documents. However, there are additional activities that a state may want to consider completing during this phase of the project:

#### 1. Define the scope of the Medicaid Enterprise

The agencies or departments that comprise the Medicaid Enterprise vary from state to state. Some states consider any department that the Medicaid Management Information System (MMIS) processes medical claims for, such as public health and behavioral health, as part of the Medicaid Enterprise. Other states define their Medicaid Enterprise as consisting only of the Medicaid agency. Regardless of

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how a state defines their Medicaid Enterprise, it is very important to define the scope of the project. The scope of the Medicaid Enterprise can impact the time, cost and resources of the SS-A project. States also need to determine what vendors will be included within the scope of the project. States outsource various Medicaid processes, such as prior authorization and third party recovery, that are assessed as part of the SS-A. Having a clear understanding of the boundaries for the Medicaid Enterprise established early in the project will make it easier to manage project activities going forward.

### **2. Gather supporting documentation**

The SS-A Companion guide suggests that state Medicaid executives meet to review/update strategic plans to identify goals for the transformation of the Medicaid Enterprise. In addition to meeting to review/update strategic plans, the state should also gather any documentation that exists that supports their strategic plans and goals. This documentation should include strategic goals for the organization as well as plans and goals for future technology and data related initiatives. Having this documentation available will help the Medicaid Enterprise be better prepared to identify their To Be vision and create the MITA Roadmap.

### **3. Create a dedicated project team to support all project activities**

The SS-A Companion guide recommends identifying a MITA project manager and project team members, but it does not provide any direction on what role the team members will perform for the project. The importance of having the right state staff, whether a vendor is assisting with the SS-A or not, is critical for the success of the project. The state team members do not have to be MITA experts; however, they should be knowledgeable about Medicaid Enterprise operations, systems, and people. The members of the state MITA team should be able to dedicate significant time to the MITA project. If a vendor performs the SS-A, the state MITA team will be an integral part of the project, providing assistance to the vendor through every phase of the project.

### **4. Identify Subject Matter Experts**

The state should begin identifying business and technical subject matter experts as early as possible. Identifying the correct subject matter experts can be a very difficult task. State agencies are constantly changing and are engaged in multiple initiatives which may impact the availability of state staff. Depending on how a state defines their Medicaid Enterprise (i.e., encompassing other agencies in addition to the Medicaid agency or just the Medicaid agency) the number of state staff involved in the SS-A can represent a significant percentage of the staff. The state MITA team should utilize the MITA Business Process Templates in the MITA Framework, which include a description of each MITA business process, as a tool to identify the appropriate subject matter experts. Examples of some of the questions that could be asked during this process are:

- Who currently performs the business process?
- Who has the most knowledge about the business process?
- Who will perform the business process in the future?
- Who manages the business process?
- Who knows the most about a system as an end user?
- Who knows the most about a system's interfaces?

There are no easy answers to these questions. Some of the subject matter experts will be staff that do not currently participate in the business process, but they possess valuable knowledge about the process



because they previously performed components of the process. A business process or system can have a few subject matter experts or, depending on the complexity of the process or system, it may have numerous people including vendors identified as subject matter experts.

### 5. Create a technical system inventory

A critical component of conducting the SS-A is the identification of systems that support the Medicaid Enterprise. There are many systems that exist to support the operations of the Medicaid Enterprise and some of these systems may not be familiar to the state MITA project team. By creating an inventory of systems and applications, the Medicaid Enterprise will be establishing the foundation for completing the Technical and Information Architectures. The system inventory can also drive the identification of technical subject matter experts.

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