Periodic Data Matching (PDM) Field Test

In this proposal, the METS PMT seeks ESC approval for a brief turn-on, then pause (after first PDM cycle) PDM field test to ensure functionality before full deployment.

Turn-on, then pause (after the first PDM cycle) timeline

Counties are proposing a statewide turn-on, then pause (after the first PDM cycle). It would begin as soon as possible after the 18.2 deployment. The first PDM batch would run in July (as previously scheduled) for the month of September, with relevant cases closing on October 1.

Field test evaluation criteria

Counties will convene a small group of Counties that will function as a set of "super users" who will be tasked with collecting and sharing feedback with DHS and MNIT on the PDM experience through participation on an Assessment Workgroup. Our evaluation will focus on the following:

- PDM system functionality – is it operating per business requirements?
- Current system issues – are any current, known system issues greatly exacerbated by the PDM process?
- Operational issues – do any process issues arise that were unanticipated and/or create additional, previously unknown manual workarounds?

Details of the criteria are as follows:

General PDM Functionality
- Are all discrepancies being raised appropriately and for the correct populations?
- Does the auto close functionality work as expected?

Operational (Training & Instructions)
- Are instructions in OneSource clear and correct?
- Are there any new or unexpected manual workarounds identified as necessary to complete the PDM process?

Notices
- Are the closure notices issued timely, giving proper notice?
- If Counties receive a large volume of calls and questions specific to the PDM notices…
    - Is there one question or area of a notice that seems to be causing confusion?
    - Is there one notice in particular that is problematic?

MMIS interface
- Is the interface working properly when a client resolves a discrepancy and is determined eligible for a different program?
- Is the interface working properly for case closure?
- Does the closure/reopen interface work as expected so a manual workaround is not required?

Other
- Are the reports usable and accurate?
- Can you enter a Change in Circumstances during the PDM process as expected?
- Are all cases selected for PDM outside of their renewal period, as expected?

Counties request assistance and participation on the Assessment Workgroup from both DHS and MNIT to create the structure and mechanism for which the field test feedback is gathered and shared. The intent is that this will be completed prior to the field test beginning in July, and Counties would begin gathering the feedback as soon as the first batch runs and will continue throughout the duration of the full PDM cycle. As the field test is proceeding, analysis of the feedback received will take place.

Next steps and proposed timeline

July 2018	PDM process begins – case selection and projected eligibility batches run
August 2018	Discrepancy notices generated and mailed to clients
July – September 2018	"Super User" counties utilize Assessment Criteria to track and gather data on PDM experience. The Assessment Workgroup will have regular check-ins during this period to review feedback and progress of field test.
August – September 2018	Workers process discrepancies and extensions
September 2018	Closure notices generated and mailed to clients
October 1, 2018	First day of coverage loss for relevant cases
Week of October 15, 2018	Assessment Workgroup convenes to consider all data and feedback collected to date, determines what (if any) additional information or research is needed.
Week of October 22, 2018	Assessment Workgroup provides preliminary report on field test experience to METS-Program Management Team (PMT) and Executive Steering Committee (ESC)
October 28 – November 23, 2018	Further analysis of field test feedback; final report created
Week of November 19, 2018	Final report presented to METS PMT
November 27, 2018	Final report presented to METS ESC

If it is determined that defect fixes are required to METS before PDM can be turned back on, the defects would be prioritized per existing procedures and through the governance structure. This would occur through the Project Team if the PDM warranty period is extended, or through the Defect Management Workgroup. If no fixes are needed, PDM could be turned back on as soon as possible.