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Eight Key Learnings Before Modernizing Your State's Legacy System

Is your state searching for an eligibility solution or struggling with an aging system? Modernizing solutions and enhancing maintenance and operations (M&O) can be a heavy lift, requiring a significant amount of money, time, resources and, potentially, disruption. That's why it's important to leverage the right strategies and support to maintain current operations, adhere to compliance and monitoring standards, meet policy and regulatory requirements, protect the availability and integrity of information systems and assets, and avoid security compromises.

As you embark on M&O modernization, consider how these eight best practices can drive your success.

1. Remember, this is more than a technology project

It's actually a business improvement initiative. The difference requires a focus on improving and enhancing the way program benefits and services are provided, and that means working with all stakeholders. A collaborative plan from your vendor that encompasses system priorities, policy requirements, existing operations, and technologies—while taking into account the impact on users across departments—will help prevent a decline in productivity when the system enhancements are implemented. *Pro tip: Consider including those who are receiving the benefits in your advisory board along with state staff. After all, they're in the best position to advise on where improvement is needed from the consumer perspective.*



2. Choose your vendor carefully

Select a partner with health and human services (H/HS) and federal requirements system knowledge, as well as a strong technical background. Experience with maintaining, operating, and enhancing state H/HS systems will help ensure the vendor:

- Understands federal and state policy guidelines and requirements
- Designs a system that adheres to those guidelines while also helping you be more efficient in your compliance and performance
- Focuses on maintaining and enhancing a solution that continually focuses on the end-user experience and needs

3. Take an “evolution” rather “revolution” approach to modernization

Modernization and innovation do not require a complete rebuild or replacement of existing systems. Rather than a “big-bang” approach, adopt an evolutionary path by enhancing solutions in a modular fashion that incrementally and continually modernizes the overall ecosystem. This could mean creating a path to modernization that can have multiple time frames (short-term, intermediate, and long-term), allowing your state to update its legacy solution one module at a time. With an evolutionary approach, you can update

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without disrupting the agencies relying on the eligibility system and also prioritize limited resources.

4. Avoid surprises

Keep all stakeholders apprised of your development process and don't wait for the "big reveal." Transparency through regular status updates and system demos allows for feedback and questions along the way and cuts down on resistance to the final deliverable.

5. Identify any potential security issues

Make sure your vendor understands both state and federal security guidelines, has a process for incorporating new guidelines as they evolve, proactively identifies potential vulnerabilities and remediates them, and can protect data integrity. An internal security assessment provides preparation for successful federal audits.

6. Leverage analytics and automation

Advanced analytics can help states better understand their population, network, operations, and the larger state ecosystem. Data assets across H/HS provide insights to validate and

support your decisions so you can take action to improve program initiatives while meeting reform and regulatory change demands. Making automation a goal of your M&O engagement will reduce both manual processes and the opportunity for human error.


7. Prioritize the customer

You want to avoid designing a system that meets technical needs but falls short on functionality for your customers. Here's how: Align business, operations, and technology from the start. With business, operations, and technology in lockstep you can minimize or avoid internal struggles and can achieve an interface that is highly functional from both a technology and end-user perspective.

8. Don't rush, and always make time for testing

Moving too quickly without proper planning and testing of modernization efforts is a common M&O modernization pitfall. Be sure your time frame, however long or short, factors in the appropriate level of testing to ensure system quality standards are met and leaked defects are prevented—including business users beyond the technology team—to ensure a smooth rollout.

Learn More

Find out how your state can implement modernization without disruption. Contact Optum at optum.com/stategovcontact. 

About Optum

For more than 25 years, Optum has helped state governments simplify access to care, improve program operations, empower individuals, and promote healthier outcomes. Leveraging our extensive H/HS and federal knowledge from an enterprise-wide perspective, we develop automated, user-friendly solutions for state H/HS agencies to streamline eligibility and enrollment. Many at Optum have worked in state government, and we bring to our clients a balanced team with expertise in technology, security, policy, and business implementation. Our collaborative approach helps states have all stakeholders represented in an M&O modernization effort, guided by a common set of goals that will ultimately improve the health and well-being of individuals and the population as a whole.

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