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B3: METHOD OF APPROACH - DETAILED IMPLEMENTATION PLAN

The Solari and Banner University Family Care (BUFC) organizations utilize a team of project managers who have demonstrated experience implementing projects similar in scope to the H2O program. These teams utilize best practices as identified by the Project Management Institute.

METHODOLOGY

This project team will utilize a hybrid model of project management. Some work components have a determined schedule and will operate in a waterfall process. Others utilize the agile methodology – such as all technical system builds. This means that Solari prefers to build in an iterative approach. Whenever possible, the work is organized into components that can be broken down into smaller parts – so that they are built, tested, and approved as time goes on. This allows the development team to receive feedback and make corrections earlier on in the project life cycle.

Solari and BUFC use Microsoft Project and Atlassian's Jira work management application to track work and ensure that the project stays on track.

WORKGROUPS

For this project, Solari and BUFC will utilize workgroups to approach a project of this size. The scope of work is broken down into task lists that are assigned to a workgroup. Workgroups meet independently to ensure that tasks are progressing, pulling in stakeholders from outside the workgroup when needed.

Planned workgroups:

- Housing Eligibility & Services
- Provider & Network Management
- Claims
- Systems
- Data & Analytics
- Contracts & Finance

The full project leadership team will meet bi-weekly so that the workgroup leads can provide updates, identify blockers, and check in on progress towards workgroup goals.

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MILESTONES

Solari and BUFC have partnered to develop a detailed draft implementation timeline. This timeline is based on the initial understanding of the scope of work, project objectives, and deliverables. This timeline is subject to change and is based on a set of listed assumptions (below).

Department	Task Name	Goal Date
Leadership	Award announcement	7/1/2024
Leadership	Initial discovery meeting	7/2/2024
Project Management	Full Project Team Kickoff	7/8/2024
Operations	CCX member eligibility tracking system design documents complete	7/22/2024
Sys Admin	Housing services documentation system design complete	7/26/2024
Project Management	Key project stakeholders & communication plan identified	7/29/2024
Leadership	Contract with AHCCCS signed	7/29/2024
BI	Process to receive AHCCCS weekly eligibility files complete	7/29/2024
BUFC	Provider on-boarding training plan complete	8/1/2024
Sys Admin	Initial CCX build complete - demo changes, begin testing	8/5/2024
PM	Report requirement documents complete	8/5/2024
BUFC	Claims processing design complete	8/7/2024
Sys Admin	Telephony phone line design complete	8/14/2024
Operations	Policies, procedures complete for housing team, eligibility	8/21/2024
BUFC	Claims IT Milestones / Sign-off	8/21/2024
BUFC	Provider utilization monitoring process complete	8/28/2024
BUFC	Services audit process complete	8/28/2024
BUFC	Encounter validation process complete	8/28/2024
BUFC	Process for Fraud, Waste and Abuse monitoring complete	8/28/2024
Operations	Tribal community point of introductory meetings complete	9/4/2024
Operations	Health plan collaborative meetings complete	9/4/2024
BUFC	H2O Provider contracts complete	9/6/2024
Operations	Provider systems training plan complete	9/6/2024
Operations	Initial training/resource library launched	9/11/2024
Operations	Sign off on final UniteUs changes	9/13/2024
Operations	Sign off on CCX functionality	9/16/2024
Operations	Sign off on software dev functionality	9/16/2024
HR	Key personnel hired and in-place.	9/17/2024
Sys Admin	H2O Support Line build complete	9/17/2024
Operations	Solari access to AHCCCS PMMIS systems complete	9/18/2024
BUFC	Provider payment process build complete	9/18/2024
PM	Go/No Go Meeting	9/24/2024
BUFC	Provider general on-boarding complete	9/27/2024
Operations	Provider systems training complete	9/27/2024
Training	Solari housing team training complete	9/30/2024
All	GO LIVE	10/1/2024

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BI	Key dashboards published	11/1/2024
BUFC	First payments to providers	11/4/2024
PM	Go Live Retrospective Meeting	11/13/2024
Compliance/QM	Key monthly reports due - external	11/15/2024
Operations	Training/resource library complete	12/18/24
BI	Performance dashboards published	12/20/24

Timeline Assumptions:

- AHCCCS will make the project award announcement on 7/1/24, and Solari and BUFC will be permitted to begin work and incur costs immediately.
- External system stakeholders (including AHCCCS) will collaborate on shared tasks to keep the project on time.
- External sub-contractors and partner systems can establish their systems on time (i.e., UniteUs, DWEL, AHCCCS)
- Some reporting deliverables will be provided starting on November 1 other performance monitoring deliverables will need data in the systems for testing. Performance monitoring deliverables need further definition with AHCCCS.

H2O FULL IMPLEMENTATION DRAFT TIMELINE

Department	Task Name	Start	Finish	Duration
	Initiating/Planning Phase	Thu 2/1/24	Mon 8/26/24	148 days
AHCCCS	Award Notification	Mon 7/1/24	Mon 7/1/24	1 day
Leadership	Initial discovery meeting	Tue 7/2/24	Tue 7/2/24	0 days
PM	Finalize Scope	Tue 7/2/24	Mon 7/8/24	5 days
PM	Finalize timeline	Tue 7/2/24	Mon 7/15/24	10 days
PM	Full Project Team Kickoff	Mon 7/8/24	Mon 7/8/24	0 days
Leadership	Create stakeholder registry (RACI - roles, goals)	Tue 7/9/24	Mon 7/29/24	15 days
PM	Schedule recurring project team and workgroup meetings	Tue 7/9/24	Mon 7/22/24	10 days
PM	Key project stakeholders & communication plan identified	Mon 7/29/24	Mon 7/29/24	0 days
	Contracts	Thu 2/1/24	Mon 7/29/24	128 days
Leadership	Contracts needs assessment	Tue 7/2/24	Mon 7/8/24	5 days
Leadership	AHCCCS contract drafting	Tue 7/2/24	Mon 7/29/24	20 days
Leadership	Solari contract with BUFC	Tue 7/2/24	Mon 7/29/24	20 days
Leadership	Contract with AHCCCS signed	Mon 7/29/24	Mon 7/29/24	0 days
	Finance	Tue 7/9/24	Mon 8/26/24	35 days
Leadership	Create process to monitor budget	Tue 7/9/24	Mon 7/29/24	15 days
Leadership	Incorporate into invoicing process	Tue 7/30/24	Mon 8/26/24	20 days
	Implementation (execution) phase	Mon 7/1/24	Tue 12/17/24	122 days
	Solari Member Eligibility Operations	Tue 7/9/24	Tue 10/1/24	61 days
	Hiring	Tue 7/9/24	Tue 10/1/24	61 days
Operations	Finalize hiring plan, needs assessment	Tue 7/9/24	Mon 7/15/24	5 days

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Operations	Write job descriptions	Tue 7/16/24	Mon 7/22/24	5 days
HR	Begin hiring for new positions	Mon 7/22/24	Mon 7/22/24	0 days
HR	Hiring staff	Tue 7/23/24	Mon 9/2/24	30 days
IT	New hire equipment purchase, configuration	Tue 7/16/24	Mon 8/26/24	30 days
BUFC	Hiring staff	Wed 8/7/24	Tue 9/17/24	30 days
BUFC	Onboarding new hires	Wed 9/18/24	Tue 10/1/24	10 days
HR	Fully staffed	Tue 9/17/24	Tue 9/17/24	0 days
	Housing Team Operations	Tue 7/9/24	Mon 9/30/24	60 days
Operations	Needs Assessment	Tue 7/9/24	Wed 7/10/24	2 days
Operations	Finalize AHCCCS requirements for H2O eligibility	Thu 7/11/24	Wed 7/31/24	15 days
Operations	Develop Policies and Procedures	Thu 7/11/24	Wed 8/21/24	30 days
Operations	Create process for coordinating care with health plans and CBO's	Thu 7/11/24	Wed 7/24/24	10 days
Operations	Draft eligibility form letters/notices to clients	Thu 7/11/24	Wed 7/31/24	15 days
Operations	Create training plan (who will train, curriculum)	Thu 7/11/24	Wed 7/17/24	5 days
Operations	Create training schedule for staff	Thu 7/18/24	Wed 7/24/24	5 days
Operations	Policies, procedures complete for housing team, eligibility	Wed 8/21/24	Wed 8/21/24	0 days
Operations	Meetings with health plans to outline processes & procedures	Thu 8/22/24	Wed 9/4/24	10 days
Operations	Meetings with tribal community points of contact	Thu 8/22/24	Wed 9/4/24	10 days
Operations	Determine location for tracking phone line call issues, outcomes	Tue 7/9/24	Mon 8/5/24	20 days
Operations	Tribal community point of introductory meetings complete	Wed 9/4/24	Wed 9/4/24	0 days
Operations	Health plan collaborative meetings complete	Wed 9/4/24	Wed 9/4/24	0 days
Operations	Solari housing team access to PMMIS system, training	Thu 9/5/24	Wed 9/18/24	10 days
Operations	Solari access to AHCCCS PMMIS systems complete	Wed 9/18/24	Wed 9/18/24	0 days
Training	Training	Tue 9/17/24	Mon 9/30/24	10 days
Training	Solari housing team training complete	Mon 9/30/24	Mon 9/30/24	0 days
	Solari Systems	Tue 7/9/24	Tue 10/1/24	60 days
	H2O Support Line (Phone) Build	Thu 8/1/24	Tue 10/1/24	43 days
Operations	Needs assessment - design telephony call routing needs	Thu 8/1/24	Wed 8/7/24	5 days
Sys Admin	Contracting with Five9 for licenses, service order	Thu 8/8/24	Wed 8/28/24	15 days
Sys Admin	Telephony phone line design complete	Wed 8/14/24	Wed 8/14/24	0 days
Sys Admin	Create UAT script	Thu 8/15/24	Wed 8/21/24	5 days
Sys Admin	Build H2O support line	Wed 8/14/24	Tue 9/3/24	15 days
Sys Admin	Phone line user acceptance testing	Wed 9/4/24	Tue 9/17/24	10 days
Operations	Phone line user acceptance testing	Wed 9/4/24	Tue 9/17/24	10 days
BUFC	Phone line user acceptance testing	Wed 9/4/24	Tue 9/17/24	10 days
Sys Admin	H2O Support Line build complete	Tue 9/17/24	Tue 9/17/24	0 days
Sys Admin	Activate the line, hours of operation, etc.	Tue 10/1/24	Tue 10/1/24	0 days
	Unite Us Build	Fri 7/12/24	Fri 9/13/24	45 days
Sys Admin	Unite Us kickoff	Fri 7/12/24	Fri 7/12/24	0 days

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Sys Admin	Needs assessment	Mon 7/15/24	Fri 7/26/24	10 days
Sys Admin	Housing services documentation system design complete	Fri 7/26/24	Fri 7/26/24	0 days
Operations	Build system	Mon 7/29/24	Fri 8/23/24	20 days
Operations	Create UAT Script	Mon 7/29/24	Fri 8/2/24	5 days
Operations	Create Help Guide	Mon 7/29/24	Fri 8/2/24	5 days
Sys Admin	Housing system user acceptance testing	Mon 8/26/24	Fri 9/13/24	15 days
Operations	Housing system user acceptance testing	Mon 8/26/24	Fri 9/13/24	15 days
BUFC	Housing system user acceptance testing	Mon 8/26/24	Fri 9/13/24	15 days
Operations	Sign off on final UniteUs changes	Fri 9/13/24	Fri 9/13/24	0 days
	CCX Build	Tue 7/9/24	Tue 9/17/24	51 days
Operations	Needs assessment - determine needs for changing forms	Tue 7/9/24	Mon 7/22/24	10 days
Operations	CCX member eligibility tracking system design documents complete	Mon 7/22/24	Mon 7/22/24	0 days
Sys Admin	Contracting with Harris for licensing	Tue 7/9/24	Mon 8/19/24	30 days
	Solution/UAT Round 1	Tue 7/23/24	Mon 8/26/24	25 days
Sys Admin	Build changes to forms	Tue 7/23/24	Mon 8/5/24	10 days
Sys Admin	Initial CCX build complete - demo changes, begin testing	Mon 8/5/24	Mon 8/5/24	0 days
Sys Admin	Create UAT script	Tue 8/6/24	Mon 8/12/24	5 days
Sys Admin	Create Help Guide	Tue 8/6/24	Mon 8/12/24	5 days
Sys Admin	Solution export	Tue 8/6/24	Mon 8/12/24	5 days
Operations	UAT	Tue 8/13/24	Mon 8/26/24	10 days
	Solution/UAT Round 2	Tue 8/27/24	Tue 9/17/24	16 days
Sys Admin	Build changes to forms	Tue 8/27/24	Mon 9/2/24	5 days
Sys Admin	Demo changes	Mon 9/2/24	Mon 9/2/24	0 days
Sys Admin	solution export	Tue 9/3/24	Mon 9/9/24	5 days
Operations	UAT round 2	Tue 9/10/24	Mon 9/16/24	5 days
Sys Admin	Review UAT feedback	Mon 9/16/24	Mon 9/16/24	0 days
Sys Admin	Solution push to PROD	Tue 9/17/24	Tue 9/17/24	1 day
Operations	Sign off on CCX functionality	Mon 9/16/24	Mon 9/16/24	0 days
	Software Development	Tue 7/9/24	Mon 9/16/24	50 days
Operations	Needs assessment for software development	Tue 7/9/24	Mon 7/15/24	5 days
Operations	Create software dev requirements	Tue 7/16/24	Mon 7/29/24	10 days
BI	Build software dev	Tue 7/30/24	Mon 8/19/24	15 days
BI	Initial build complete/demo	Mon 8/19/24	Mon 8/19/24	0 days
Operations	User acceptance testing	Tue 8/20/24	Mon 9/2/24	10 days
BI	Refactoring, building in changes	Tue 9/3/24	Mon 9/9/24	5 days
Operations	User acceptance testing	Tue 9/10/24	Mon 9/16/24	5 days
Operations	Sign off on functionality	Mon 9/16/24	Mon 9/16/24	0 days
	Network, Provider Management	Mon 7/1/24	Fri 9/27/24	65 days
	Solari Provider Management Operations	Mon 7/1/24	Fri 7/12/24	10 days
Operations	Provider management needs assessment	Mon 7/1/24	Fri 7/5/24	5 days
Operations	Identify providers to participate in H2O	Mon 7/1/24	Fri 7/5/24	5 days
Operations	H2O initial providers identified	Mon 7/1/24	Fri 7/5/24	5 days

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Operations	Create provider stakeholder list - communication	Mon 7/1/24	Fri 7/12/24	10 days
	BUFC Network Management	Mon 7/1/24	Fri 9/20/24	60 days
BUFC	Establish provider requirements	Mon 7/1/24	Fri 7/5/24	5 days
BUFC	Establish process to monitor network availability	Thu 7/11/24	Wed 7/31/24	15 days
BUFC	Contracting with new providers	Mon 7/8/24	Fri 9/6/24	45 days
BUFC	Updating provider data/claims system	Mon 9/2/24	Fri 9/20/24	15 days
BUFC	H2O Provider contracts complete	Fri 9/6/24	Fri 9/6/24	0 days
	Provider Training	Thu 7/11/24	Fri 9/27/24	57 days
Operations	Training needs assessment	Thu 7/11/24	Wed 7/17/24	5 days
Operations	Build training library	Thu 7/18/24	Wed 8/7/24	15 days
Operations	Create training materials, recordings, help guides, etc.	Thu 8/8/24	Wed 9/11/24	25 days
BUFC	Create training materials, recordings, help guides, etc.	Thu 8/8/24	Wed 9/11/24	25 days
Operations	Initial training/resource library launched	Wed 9/11/24	Wed 9/11/24	0 days
Operations	Create additional training/resource library content	Thu 9/12/24	Wed 12/18/24	70 days
Operations	Training/resource library complete	Wed 12/18/24	Wed 12/18/24	0 days
	Provider On-Boarding Training (BUFC)	Fri 7/12/24	Fri 9/27/24	56 days
BUFC	Create general on-boarding training plan for providers (requirements, billing, etc.)	Fri 7/12/24	Thu 8/1/24	15 days
BUFC	Provider on-boarding training plan complete	Thu 8/1/24	Thu 8/1/24	0 days
BUFC	Facilitate provider on-boarding training	Mon 9/9/24	Fri 9/27/24	15 days
BUFC	Provider general on-boarding complete	Fri 9/27/24	Fri 9/27/24	0 days
	Provider Systems Training (Solari)	Mon 8/26/24	Fri 9/27/24	25 days
Operations	Create plan for provider systems training	Mon 8/26/24	Fri 9/6/24	10 days
Operations	Provider systems training plan complete	Fri 9/6/24	Fri 9/6/24	0 days
Operations	Facilitate provider systems training	Mon 9/9/24	Fri 9/27/24	15 days
Operations	Provider systems training complete	Fri 9/27/24	Fri 9/27/24	0 days
	Claims Processing	Thu 7/11/24	Wed 9/18/24	50 days
BUFC	Claims IT	Thu 7/11/24	Wed 9/4/24	40 days
BUFC	Sprint Grooming	Thu 7/11/24	Wed 7/17/24	5 days
BUFC	Capability Requirements	Thu 7/11/24	Wed 7/24/24	10 days
BUFC	Sprints	Thu 7/25/24	Wed 8/21/24	20 days
BUFC	Claims system QA	Thu 7/25/24	Wed 8/21/24	20 days
BUFC	End to End Testing	Thu 7/25/24	Wed 8/21/24	20 days
BUFC	UAT	Thu 7/25/24	Wed 8/21/24	20 days
BUFC	Claims IT Milestones / Sign-off	Wed 8/21/24	Wed 8/21/24	0 days
BUFC	Performance Testing	Thu 8/22/24	Wed 9/4/24	10 days
BUFC	Regression Testing	Thu 8/22/24	Wed 9/4/24	10 days
	Claims Operations	Thu 7/11/24	Wed 9/18/24	50 days
BUFC	Claims process needs assessment	Thu 7/11/24	Wed 8/7/24	20 days
BUFC	Claims processing design complete	Wed 8/7/24	Wed 8/7/24	0 days
BUFC	Build process/systems to generate claims based on data feed from Solari/providers	Thu 8/8/24	Wed 9/4/24	20 days

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BUFC	Create workflow for processing claims responses (denials, eligibility issues)	Thu 8/8/24	Wed 9/4/24	20 days
BUFC	Create process to make payments to providers based on claims	Thu 8/8/24	Wed 9/18/24	30 days
BUFC	Provider payment process complete	Wed 9/18/24	Wed 9/18/24	0 days
	Quality Management	Thu 7/11/24	Wed 8/28/24	35 days
BUFC	Quality management needs assessment	Thu 7/11/24	Wed 7/24/24	10 days
BUFC	Establish process for utilizing reporting to oversee provider utilization	Thu 7/25/24	Wed 8/28/24	25 days
BUFC	Establish process to audit services	Thu 7/25/24	Wed 8/28/24	25 days
BUFC	Create process for encounter validation	Thu 7/25/24	Wed 8/28/24	25 days
BUFC	Create process for Fraud, Waste and Abuse	Thu 7/25/24	Wed 8/28/24	25 days
BUFC	Provider utilization monitoring process complete	Wed 8/28/24	Wed 8/28/24	0 days
BUFC	Services audit process complete	Wed 8/28/24	Wed 8/28/24	0 days
BUFC	Encounter validation process complete	Wed 8/28/24	Wed 8/28/24	0 days
BUFC	Process for Fraud, Waste and Abuse monitoring complete	Wed 8/28/24	Wed 8/28/24	0 days
	Reporting	Tue 7/9/24	Fri 10/4/24	64 days
PM	Reporting needs assessment - what new reports are needed, what updates to existing reports?	Tue 7/9/24	Mon 7/15/24	5 days
Leadership	Create report deliverable timeline, due dates	Tue 7/16/24	Mon 7/22/24	5 days
PM	Create report requirement documents	Tue 7/16/24	Mon 8/5/24	15 days
BI	Meetings with AHCCCS to build process to receive weekly member files	Tue 7/16/24	Mon 7/29/24	10 days
BI	Build process to receive weekly member files from AHCCCS (SFTP?)	Tue 7/16/24	Mon 7/29/24	10 days
BI	Process to receive AHCCCS weekly eligibility files complete	Mon 7/29/24	Mon 7/29/24	0 days
BI	Schema Update	Tue 8/6/24	Wed 8/14/24	7 days
BI	Update existing schema	Tue 8/6/24	Wed 8/14/24	7 days
BI	Reporting schema updated with new data sources	Wed 8/14/24	Wed 8/14/24	0 days
BI	Reports	Thu 8/15/24	Fri 10/4/24	37 days
BI	Build Reports	Thu 8/15/24	Wed 9/18/24	25 days
Compliance/QM	Report validation	Thu 9/19/24	Wed 10/2/24	10 days
Operations	Sign off on reports for go live	Wed 10/2/24	Wed 10/2/24	0 days
BI	Publish reports to production	Thu 10/3/24	Fri 10/4/24	2 days
	Marketing & Communication	Tue 7/9/24	Fri 9/27/24	59 days
Communications	Mar-Comm needs assessment	Tue 7/9/24	Mon 7/22/24	10 days
Communications	Internal communication to staff	Mon 9/2/24	Fri 9/27/24	20 days
	Go-Live	Tue 9/17/24	Tue 10/1/24	11 days
PM	Create implementation plan, support plan	Tue 9/17/24	Mon 9/30/24	10 days
PM	Go/No Go Meeting	Tue 9/24/24	Tue 9/24/24	0 days
All	GO LIVE	Tue 10/1/24	Tue 10/1/24	1 day

	Post-Go Live (Monitoring) phase	Tue 10/1/24	Tue 12/17/24	56 days
Sys Admin	Update line to be live	Tue 10/1/24	Tue 10/1/24	1 day
Operations	Monitor for issues	Wed 10/2/24	Tue 12/17/24	55 days
BUFC	Claims team processing data files to generate claims	Tue 10/1/24	Mon 11/4/24	25 days
BI	Key dashboards published	Fri 11/1/24	Fri 11/1/24	0 days
BUFC	First payments to providers	Mon 11/4/24	Mon 11/4/24	0 days
BI	Key monthly reports due - internal	Tue 11/5/24	Tue 11/5/24	1 day
Compliance/QM	Key monthly reports due - external	Fri 11/15/24	Fri 11/15/24	0 days
PM	Project Retrospective Meeting	Wed 11/13/24	Wed 11/13/24	1 day
BI	Performance dashboards published	Fri 12/20/24	Fri 12/20/24	0 days