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Redefining the Medicaid Waiver Experience for Case Workers

For access to this presentation, please visit: www.mmis.georgia.gov → Provider Information → Provider Notices → “Presentation - Fall Medicaid Fair 2025 - Georgia Horizons: HCBS Waiver Case Management System Updates”

Access the YouTube Presenter View Link: <https://youtu.be/HEDYjurREBE>

Access the YouTube Presentation View Link: <https://youtu.be/wghGLfVYibQ>

Powering Case Management with Flexibility and Insight

Legacy case management systems often create barriers to efficiency, collaboration, and user satisfaction. Microsoft Power Platform enables us to break down those barriers with a connected, intuitive, and flexible platform that empowers staff, enhances the user experience, and adapts to future needs.

TODAY'S CHALLENGES

- Siloed systems and manual workarounds
- Outdated, non-intuitive user interfaces
- Limited flexibility to adapt to policy or process changes
- Minimal visibility into cases and performance
- High maintenance costs and technical debt



An efficient, automated, and transparent case management system can enhance the accuracy of data and quality of service for individuals across Georgia.

Medical Assistance Plans Georgia Horizons



Transforming the Waiver Experience for Case Workers Supporting EDWP

We're building a case management system, Georgia Horizons, leveraging Microsoft Power Platform to enhance automation, transparency, and the overall efficiency of the program. The current system, which relies on a legacy case management tool, requires numerous manual processes, leading to inefficiencies and friction.

Goals

- Leverage Microsoft platforms and integrations for seamless experience and scalable architecture
- Optimize and enforce case workflows based on policy and procedure
- Provide a stable application leveraging cloud-based technologies
- Enable agencies to make informed decisions by providing real time and near real time data and reporting
- Improve service delivery through more accurate processing of their cases and incidents, leading to timely access to needed care and services
- Automating lengthy processes reduces the burden of manual data entry and tracking
- Active monitoring of nightly file Integrations with GAMMIS for prior authorizations, Medicaid status



HOW WE'RE DOING THIS

We approach every endeavor with a human-centered design mindset, ensuring that solutions are built around the real needs of the people who will use them.

By combining empathy-driven research with technical expertise, we create systems that are intuitive, effective, and sustainable.

Our Process:

- Discovery & Architecture
- Design
- Build
- Test
- Train
- Go-Live & Support

Key Benefits

AUTOMATION + EFFICIENCY

TRANSPARENCY + REAL-TIME DATA

USER-CENTERED DESIGN

COMPLIANCE + SECURITY

Our Approach

Engaging with users helps identify what will make the new system successful as an MVP and beyond, as well as ensure potential risks are heard and understood.

We met with **16 AAA users and 36 CMA users** to uncover challenges with current experience and workflows and opportunities for the future state. All users were asked to share hopes and needs for the new system, surfacing **key themes** and valuable insights.

4 Key Themes from the User Interview Sessions:

Unreliable Data

System Performance

Complex Navigation

Inefficient Communication

4

DCH MAPS SESSIONS &
PERSONA WORKSHOP

6

AAA ORGANIZATIONS
INTERVIEWS

10

CMA ORGANIZATION
INTERVIEWS



5 TOPICS COVERED

User Needs, Current Experience &
Process, Challenges/Pain Points, Future
State Opportunities, Requirements
Gathering

Case Management User Insights



Unreliable Data

- 24hr delay on accurate data is lengthening task completion
- Data discrepancies and validation requires frequent manual reconciliation, system integrations are desired
- Data is not organized in an intuitive manner and by use case



System Performance

- Frequent system crashes lead to loss of data and the need to re-enter information
- Slow loading times and performance issues cause frustration and delays, impacting user productivity and the quality of service for clients
- Several external solutions exist for users to workaround WellSky



Complex Navigation

- Users struggle to enter key data, perform assessments, and access key information
- Best practices are not being used, such as: windows, and multiple clicks (steps) are required to perform simple tasks
- Navigation and processes aren't intuitive nor user-friendly without training and ongoing support



Inefficient Communication

- Lack of internal communication features within WellSky forces reliance on external emails, which is inefficient and difficult to track
- Need for a better system to alert users, such as real-time updates and notifications about critical changes or statuses

High-level CCSP and SOURCE Functional Experience



Transformation Benefits



Operational Efficiency

By automating and redesigning workflows, Authorized User experiences improved productivity and streamlined operations, reducing administrative costs.



Scalability & Flexibility

Scalable architecture allows for the seamless addition of new modules and functionalities as the program evolves, enabling long-term adaptability and resilience.



Increased Transparency

Real-time status updates and comprehensive reporting capabilities provide stakeholders with clear insights into case and incident progress and outcomes.



Regulatory Compliance

A modern system enables compliance with state and federal regulations, especially in managing health and personal information securely.



Enhanced Data Management

Improved data accuracy and integrity enable users to make informed decisions and policy adjustments.



Reduced Workload & Faster Turnaround

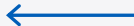
Automation alleviates the burden of manual data entry and tracking, enabling staff to focus on patient care.



Proactive Incident Management

Enhanced tracking and reporting enable swift issue response, minimizing disruptions to service delivery.

Empowering Georgians

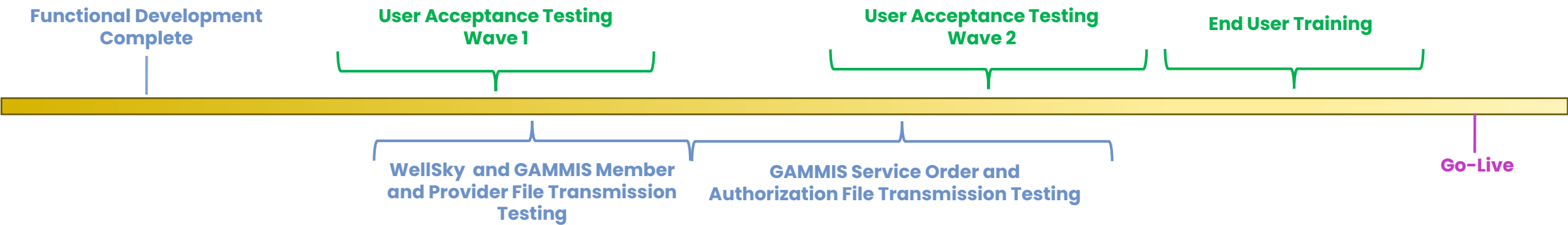


A modernized case management system ensures applicants receive timely updates, clear guidance, and reliable service—making the Medicaid waiver process less stressful, more predictable, and supportive of better health and wellbeing outcomes.

Timeline

Georgia Horizons will be operational for CCSP and SOURCE programs by June 1, 2026

Illustrative. Timeline not to scale.



What does this mean for you?

- ✓ CMA will submit all service orders through Georgia Horizons
- ✓ Nightly data file transmissions will be sent and received from GAMMIS
- ✓ Medicaid Eligibility, Service Authorizations in GAMMIS will be reflected in Georgia Horizons
- ✓ Standardization of process and documentation for all CCSP and SOURCE
- ✓ Transparency of data
- ✓ Proactive identification of Training Needs

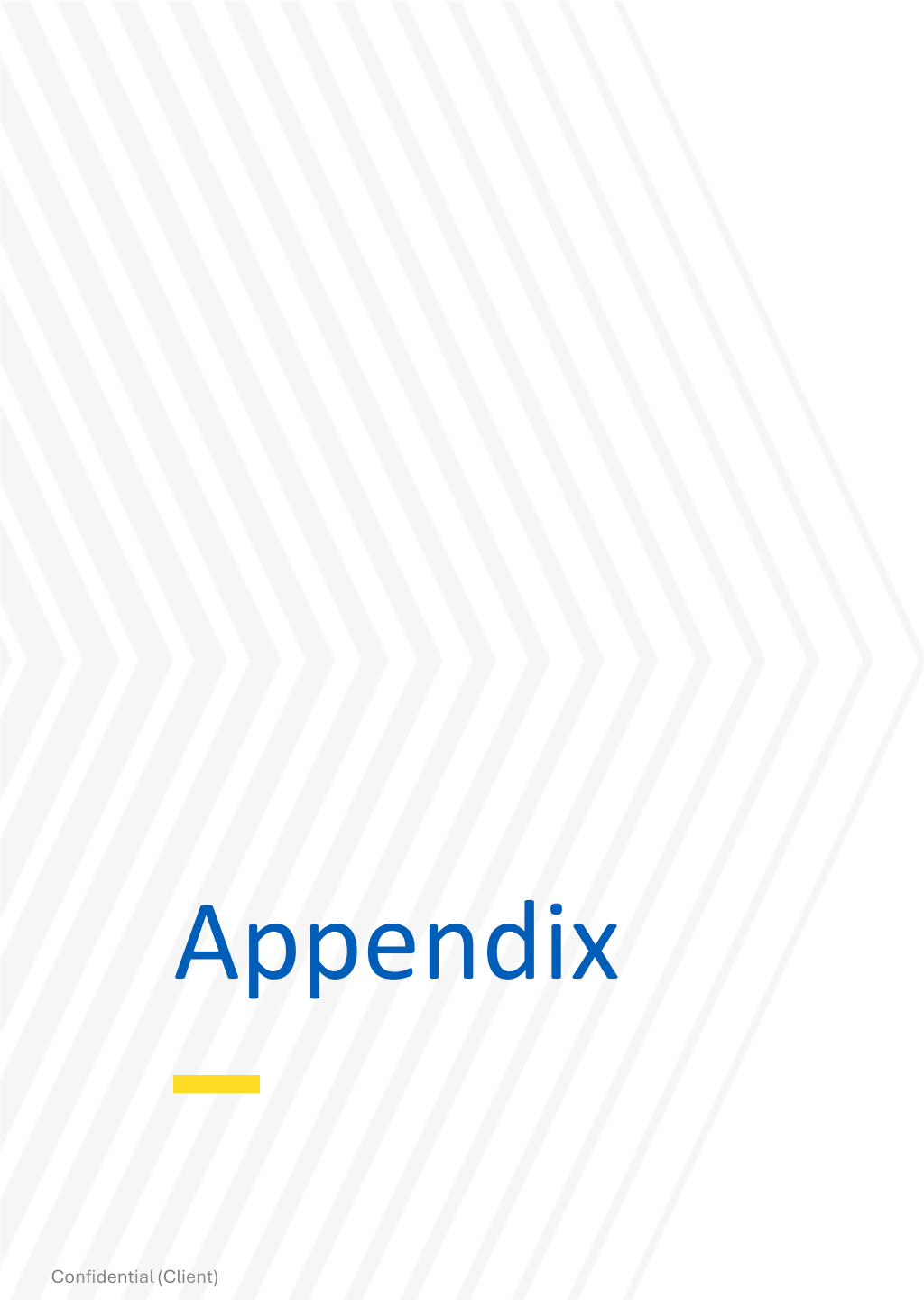


Thank you.

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Appendix



THE VISION



To develop an efficient, automated, and transparent case management system that enhances the accuracy of data and quality of service for elderly and disabled individuals in Georgia.

EXECUTIVE SUMMARY



User discovery sessions with AAA and CMAs revealed a critical need for enhanced data entry, system reliability, user friendliness, and trust.

AAA & CMA users have developed their own mechanisms to help navigate the current system's limitations to complete daily tasks to ensure Members (clients) receive their care.

Both user groups feel WellSky is unreliable and unintuitive, expressing excitement to be included in development of a new system. All parties are willing to test and validate future efforts.

With limitations of WellSky, both user groups have been able to supplement daily tasks with workaround solutions—using whiteboards, notes, paper referrals, excel sheets, SharePoint sites.

UNRELIABLE DATA

Establish Client Data as Source of Truth

The current experience is not seen as reliable and fails to foster confidence among users who need accurate data for their daily tasks—resulting in duplicative efforts, such as: data re-entry, and data validation within other systems.

Key Observations

- Client record information is 24hrs behind and lengthens the process of executing tasks
- Difficulty in finding client records due to multiple duplicate records and inefficient search functionalities
- Essential data points are missing from Wellsky and need to be validated and searched for in other systems
- Difficult to sort existing data and analyze it, also generating reports is a pain point



Does not increase our
efficiency or
organization in daily
workflows. We need
ease, efficiency,
reliability.

SYSTEM PERFORMANCE

Modernize the System Performance and Functionality

It became clear that the current interface does not serve the user's needs, and the workflow and process is cumbersome.

Key Observations

- Frequent system time outs, long loading times, and system crashes occur
- Users are required to manual save frequently during assessment intakes
- Difficult to upload documents and generate relevant reports successfully, complicated process
- Users desire a more streamlined and automated system to reduce duplicated efforts and errors, such as: electronic signatures, document generation, off-line data collection
- Need for better-defined user roles and permissions to prevent unauthorized access and errors



Members get
frustrated waiting so
long, an average 15-20
minutes, due to
loading issues.
Leads to follow-ups

Create a Seamless, Frictionless Path with Wayfinding Cues

The current experience is seen as an obstacle rather than a tool and fails to foster autonomy among users who expect intuitive navigation, reduced steps, improved data entry experience, and robust search functionality —resulting in user's needing to create and maintain external workaround solutions.

Key Observations

- System's UI is outdated and does not follow accessibility best practices nor WCAG standards
- Users lose their way when navigating between windows
- Users have a hard time locating key information
- The information architecture is not intuitive and doesn't consider the user's process flow
- Developing their own system trainings, documentation due to outdated manuals



The interface can be complex and not always intuitive, which makes it challenging to locate specific features and complete tasks efficiently.

Streamline Communication and Collaboration Between Users

Many interview sessions highlighted the desire for more streamlined communication features within the system that enabled efficient collaboration between various users—including alerts, notifications, automated email updates, error messages, tooltips, internal messaging, CMA availability, record update history.

Key Communication Observations

- Alerts are not reaching users at all or in timely manner, forcing users to duplicate the message outside the system as an email
- Users are burdened with managing multiple external communication threads
- Users want to be able to notify each other with availability, updates, record status changes, assignments within system



We need to be able to
communicate with
others through the
program.



Core Capabilities

Email and In-App Notifications

Messages and Alerts sent to a user's registered email address to inform them of important events (e.g., task assignments, status changes, deadlines, approvals).

Role Based Access Control (RBAC)

Permissions are granted according to a user's role, ensuring that users only access data and features relevant to their responsibilities.

Task Assignment and Tracking

Users can delegate tasks to individuals or teams, specifying details like deadlines, priority, and instructions.

Workflows and Business Process Flows

Guides users through stages of case resolution with defined steps and actions.

Dashboards and Charts

Real-time data visualization for monitoring workload (This is separate from power BI).

Views and Filters

Customizable system and personal views to organize and segment data.

Activity Timeline

Unified view of all activities (emails, notes, calls, appointments) related to a record.

Form Customization

Show/hide fields or tabs based on field values or roles to enforce business logic.

EDWP Technical Solutions

USER INTERACTION & SUPPORT

USER INTERFACE

Power Apps – Model Driven App

- Internal app for case managers and administrators for operational workflows.
- Optimized and ADA-compliant mobile access for case mgrs. and geographically distributed users.



ROLE-BASED ACCESS

Auth0 and External Entra ID

- Auth0 as IDP and mirrored external account in Entra



MOBILE READY

Power Apps

- Mobile offline profiles



EMAIL NOTIFICATION

Shared Mailboxes

- Created in Exchange Online and connected to each environment



DATA MANAGEMENT AND INTEGRATION

DATA MANAGEMENT

Dataverse

- Dataverse: Operational data store for active case management workflows, incident tracking, and live reporting.



INTEGRATIONS

Lambda, AWS, MuleSoft

- GAMMIS Integration: batch processing of Medicaid data using SFTP for service authorizations, billing, and reporting



DOCUMENT MANAGEMENT

Laserfiche

- Stores all documents
- Retrieves them as downloads in the browser when prompted



AUTOMATION & INTELLIGENCE

WORKFLOW AUTOMATION

Power Automate

- Automates processes for case intake, incident resolution, and care coordination
- Sends alerts for deadlines, approvals, and updates.



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