ARCTIC IT
Tenacious Ingenuity®

Tribal Platforms®

Tribal Platforms 4.0
May 2023

Transforming Member Service Delivery
with Centralized Cloud Applications

Arctic Information Technology, Inc.
11500 Sukdu Way, Suite 150
Anchorage, AK 99515

PREPARED BY:
Bryan Schmidt, Principal Solution Architect – CRM & Power Apps

Centralized Cloud Applications: Essential to Transforming Member Service Delivery for Tribal Organizations

Across the United States, tribal governments are tasked to provide services and manage programs for their citizen members. They have traditionally relied on legacy on-premises applications for enrollment staff to manage member data. In some cases, staff use Excel spreadsheets or paper documents to manage members because tribal administration has not invested in application tools. There are several concerns that impede the decision to invest in modern solutions:

Data sovereignty and security concerns

Tribal governments often prioritize data sovereignty and on-premises systems for security reasons to protect sensitive information related to members, resources, and cultural heritage. On-premises applications give tribes a perceived sense of control over their data, as it is stored and managed within their physical infrastructure.

Legacy systems and investments

Over the years, tribal governments may have made significant investments in on-premises hardware and software. Transitioning to a cloud-based solution may be perceived as costly or disruptive, leading tribes to continue using their existing systems, in some cases for decades.

Internet connectivity and accessibility

Some tribal communities have limited internet connectivity or face challenges in accessing reliable high-speed internet services. This can make cloud-based solutions less attractive, as they require a stable internet connection for optimal performance.

Limited IT resources and expertise

Hiring and retaining the best IT staff to administer complex systems is a challenge for tribal governments. As technology advances, it also requires constant retraining of staff to keep up with demands.

Highlights

Tribal governments are moving from a traditional on-premises databases to a modern platform-based database in the cloud, or simply building new applications in the cloud at an increasing rate. New technologies allow tribes to **address operational overhead, unlock new possibilities, implement new features quickly, increase application reliability, and serve users** locally and across larger regions.

Cloud-based tribal applications and databases are a key part of improving citizen engagement and improving service delivery. Modern intelligent applications can use historical and real-time data from interactions with members to **deliver personal and adaptable member services** and maximize opportunities.

To address these concerns, Arctic IT built a solution on the Microsoft Power Platform called *Tribal Platforms* designed to enable multiple departments to collaborate on their work with members. This is achieved with a layered security approach to keep member data confidential, yet accessible to government staff who need the information.

A foundational application within Tribal Platforms is the Enrollment application, which is a centralized database of core member data used by department staff to reduce duplicate data, improve accuracy, and streamline service delivery.

The full suite of applications available includes:

- ## Enrollment

    Centralized tribal member management, addresses, family relationships, household details, ID card

- ## Family Wellness

    Outcomes-based family and child case management, ICWA, referrals, program eligibility and participation

- ## Distribution Payments

    Member recurring and one-time payments and financial assistance management

- ## Community Portal

    Member self-service, 24-hour access to update personal data and apply for services

- ## Tribal Court

    Court case life cycle management with secure document management

"Why should a Tribe adopt a centralized application to manage tribal member data?"

A centralized application for managing tribal member data can provide numerous benefits to tribal governments, improving efficiency, enhancing member services, and ensuring data accuracy and security. A key aspect to consider is the decision to select a solution that assists in transforming and modernizing the Tribal organization to deliver improved member satisfaction in working with staff.

Members and citizens can expect exceptional and speedy service from their tribal government through personalized experiences and easy-to-use apps.

In this white paper, we discuss three user groups that would use a centralized application designed for tribal governments with a member database. The goal is to deliver a fully integrated suite of applications that serve multiple tribal groups, improve communication, speed member service delivery, and generally improve the lives of tribal members, their families, and the tribal staff that serve them.

Persona Spotlight 1: Tribal member who is requesting help from the tribal government

Persona name: Sarah Age: 34 Family: Married, 1 child	Major activities: • Raising children • Keeping the family healthy • Working part-time • Balancing the family financial budget
Pain Points: • Going to tribal office during office hours to request services and must bring my child • Unaware of when new services are available to her and her family • Barely making enough income to stay in our apartment • Working to get a degree to get a better job	What I need: • Mobile friendly website where I can view tribe services available to me and my family • The ability to communicate with my career counselor via SMS text • Eliminate visits to the tribal office as it takes me over an hour in travel time • Eliminate office visits that are a waste of time when I don't have all the documentation required

What are the ways a centralized application can assist Sarah and improve services for her family?

Member or Citizen Communication

Communication with members or citizens is an important service of any tribal government. Traditionally, tribes require members to call or visit offices in person to apply for services or provide updates. Over the past few years, more and more members are demanding the use of current technologies to engage tribal government staff. These include email, phone, mobile phone SMS text, social media, and web-based portals. Using these modern tools can help government agencies reach their constituents more effectively and provide a seamless experience across different touchpoints.
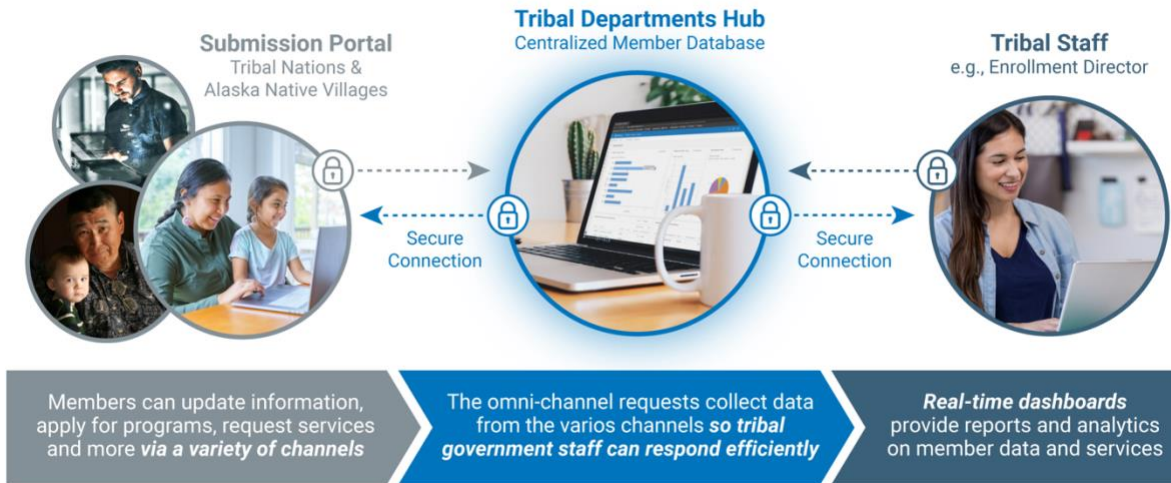
An option to consider improving member engagement is to provide more methods to connect. This is where a Customer Relationship Management (CRM) solution such as Tribal Platforms can deliver exceptional member services. Using omni-channel engagement capabilities built into the Dynamics 365 and Microsoft 365 platform solutions, Tribal Platforms enables enhanced member/citizen engagement using their preferred communication method.

Omnichannel for D365 Customer Service (available as an add-on to Tribal Platforms) offers a suite of capabilities that extend the power of D365 CS Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels.

Dynamics 365 and the Power Platform integrate with other Microsoft tools, such as Microsoft Teams, facilitating better communication and collaboration among tribal staff. This can lead to more efficient

decision-making and improved service delivery. Integrating with Azure Communication Services, staff can use Microsoft Teams to engage members using voice (phone) directly within the application.

The Community Engagement Portal, a member self-service portal available with Tribal Platforms, is a flexible and cost-efficient way to engage with members using their preferred method: using a laptop, tablet, or mobile phone. The Community Engagement Portal provides integrated, configurable web-based forms allowing staff to engage and enhance member interaction all from the comfort of a members' home. Tasks like changing contact vital statistics, mailing address, submitting a new case, or submitting an application for service are as easy as filling out an online form with uploading documents without spending time traveling to government office. The Portal allows members to follow the progress of their applications or case/referral records as they flow through the process, providing an overall enhanced and comprehensive user experience.

Enhanced Security and Data Sovereignty

Centralized applications can offer robust security features, including access controls, encryption, and audit trails. This helps protect sensitive member data and ensures compliance with data sovereignty requirements, while enabling authorized members to access the information they need. Microsoft has established industry leading cloud data center security that meets federal government compliance requirements such as FedRAMP, HIPAA, and NIST 800-53. Microsoft invests heavily in security measures to protect Tribal government data and extension member personal information. Because the member data is "owned" by the tribe and is hosted in a Microsoft data center, legally the data is sovereign to the nation and uses modern multi-factor authentication (MFA) with data encryption managed by tribal IT staff.

Arctic IT has experience connecting tribal members to the Power Apps Portal using Azure B2C (business to consumer) as the preferred authentication methods. Azure B2C is a secure repository like Microsoft Active Directory (AD) that allows staff to manage member's identities for Portal access. It allows members to use a login/password they already own such as Facebook, Google, Microsoft, or LinkedIn. Once authenticated, members access web pages that limit visibility of data based on assigned permissions to view only their personal data or related sensitive Personally Identifiable Information (PII).

No data is stored on the member or staff device; everything is stored in the secured member database.

Persona Spotlight 2: Tribal government employee who is responding to member requests

	Persona name: Dorie Age: 42 Family: Married, 3 children	Major activities: • Case Worker for Family Services Dept for protective services, employment, mental health, education, and more • Provides crisis intervention for individuals and supportive youth counseling • Serves as an advocate for members to utilize program services available and participate in sponsored events • Advocates for members to gain resources needed to improve member family life
	Pain Points: • Siloed data and systems that don't integrate between departments • Limited coordination of care for members	What I need: • To connect members with community resources and programs

• Manual data entry into multiple systems • Manual data aggregation for reporting • Unable to keep up with case load	• The ability to listen to a patient and provide counseling support with data at my fingertips • Save time in member communication to stay on top of my high priority cases. • Mobile access to my case data to work in the field with members

What are the ways a centralized application can assist Dorie serve members better?

Single system of record. Tribal Platforms provides a "master record" or single system of record to aggregate all activity for members, cases, financial reference records, and member case-related service and referral record data created by staff. The goal is to eliminate manual steps and duplicate data entry wherever possible. This will help staff become more efficient and serve business customers and the public with accurate and timely information from a unified view of member information. Tribal staff are able to better understand member needs, preferences, and interactions, facilitating more informed decision-making.

Enhanced and comprehensive user experience. Tribal Platforms provides an integrated, configurable web-based portal to engage and enhance member interaction with staff. Tasks like changing a main point of contact, updating a mailing address, submitting a new case, or processing an application or invoice will be as easy as filling out an online form. Members will be able to follow the progress of their case/referral records as they flow through the process, providing an overall enhanced and comprehensive user experience.

Robust analytical reporting. Leveraging the Microsoft platform components including Power BI, Azure Data Factory, and D365, the Tribal Platforms solution provides an enterprise-grade data aggregation and analysis environment with the latest technologies. In the

Reduces the learning curve. Introducing a new system always creates angst, and sometimes users resist adoption. Tribal Platforms provides a familiar environment and user interface by keeping the forms, processes, and data as similar as possible to those of other existing business applications (such as Microsoft 365 applications, Excel, Word, Outlook, etc.)

Model current processes while applying workflow automation. Arctic IT delivers Tribal Platforms with built-in industry best practices. It allows staff to support current processes where appropriate, while applying technology to streamline and improve member and staff interaction with automated processes. Working closely with tribal government employees, Arctic IT will continuously identify manual processes that can be supported or eliminated by automation. The Power Platform, including Power Automate, allows Tribal Platforms to automate repetitive tasks and streamline business processes. This can help staff improve operational efficiency, reduce manual errors, and free up resources to focus on more strategic initiatives.

Mobility and accessibility. Tribal Platforms can be accessed from anywhere with an internet connection such as a mobile phone, allowing staff to work remotely and collaborate more effectively and improve productivity. This increased flexibility assists staff ability to be more efficient and responsive with access to

future, the application will be able to apply predictive analytics with the help of AI and machine learning capabilities. It will help anticipate future trends and proactively address potential issues. This can lead to more effective planning and resource allocation, ultimately improving service delivery. For example, a future service could be to leverage Microsoft Synapse to analyze data and apply machine learning to provide recommendations or predict program outcomes and personalized recommendations.

critical member data any time needed, especially in a crisis.

Enabling staff access anytime, anywhere, on any device, Tribal Platforms is a mobile-enabled application supporting cross-device and cross-browser compatibilities that meet Section 508 VPAT (voluntary product accessibility template) and WCAG (web content accessibility guidelines) accessibility compliance.

Below is an example member "contact" page showing Dorie all the critical information she needs when a member calls to request services. Past communications are shown in a timeline so staff can collaborate to maintain consistency regarding requests.

Forms use "role-based security" allowing staff to control which staff have access to sensitive information such as Social Security Number (SSN) or Tribe blood quantum. Services provided to the members are displayed in related forms and are only visible if the staff person has the correct assigned security role. Family relationships, applications for service are shown on related forms with 1 click.
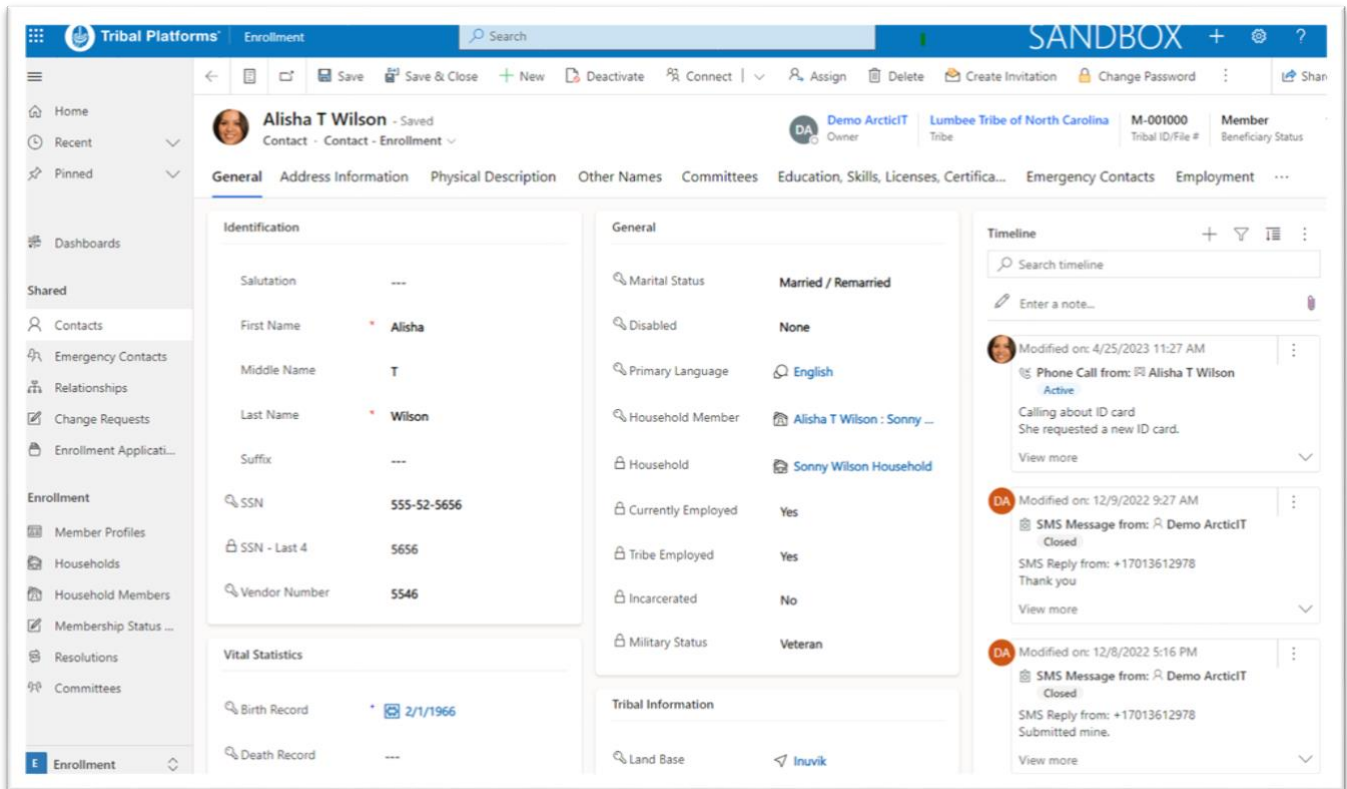
Persona Spotlight 3: Tribal government IT manager who manages the applications for tribal government staff

	Persona name: Warren **Age:** 30 **Family:** Single	**Major activities:** • Managing IT resources and applications • Planning and implementing applications for department staff including the selection of applications that meet requirements • Responsible for tribal government security for data, applications, and staff • Keeping current with technology trends
Pain Points: • Skilled resources to manage legacy applications no longer supported • Lack of agility to respond to new application requirements from department staff • Security risks as legacy applications don't use modern technology and are vulnerable to attack and data compromise • Integration challenges to make applications work togther. May require custom development		**What I need:** • Migrate to tribe-owned cloud resources to implement stronger data security • Utilize Low-Code Application Platform (LCAP) to improve ability to adapt to new requirements and eliminate custom-code • Integrated data reporting with analytics to improve usability for tribal staff • Supplement my team's limited availability to administer applications

What are the ways a centralized application can assist Warren serve his tribal government staff better?

Application management and innovation. Microsoft and Arctic IT's Tribal Platforms are constantly updating and improving their offerings, allowing IT managers to take advantage of cutting-edge technology and best practices. This drives innovation by always keeping the application up to date, reducing application patching and managing downtime. IT managers access the services using an administration portal to gain insights of application usage, assigned user access permissions. IT staff do not need to worry about back-ups as the data and applications are

Low-code app development. The Power Platform includes a suite of components that together provide a Low-Code Application Platform (LCAP) which allows Arctic IT to configure applications to meet tribal business functional requirements. The low-code / no-code model is highly configurable and allows the tribe to adapt and evolve to changing requirements without extensive coding knowledge. Government organizations can quickly develop and implement new services or features in response to emerging needs. Gartner estimates that by 2025, 70% of new applications developed by

managed by Microsoft administration staff maintaining high availability.

Continuous innovation. Microsoft regularly updates the Power Platform with new features and capabilities, enabling organizations to stay at the forefront of technological advancements. Microsoft Power Platform software updates and maintenance are administered in a managed approach ensuring the application is always using the most up-to-date and secure software services. This reduces the burden on IT staff and minimizes the risk of security vulnerabilities. Arctic IT applies these new feature enhancements to the core feature set to enable improved and new service delivery scenarios.

Application integration. Tribal Platforms applications are designed to be easily integrated with one another, other Microsoft applications, and other business applications in use by the tribe such as a financial ERP system. Application integrations enable seamless data sharing and collaboration among different departments. This integration breaks down information silos and enhance interdepartmental communication, which can lead to improved member service delivery.

enterprises will use low-code or no-code technologies, up from less than 25% in 2020.

IT staff core competencies. By outsourcing software management to a SaaS provider such as Microsoft, the Tribe's IT staff can free IT resources to focus on strategic initiatives and core competencies, which can lead to more efficient service delivery. Think of the partner organization as supplemental IT staff to help your team focus on what your team does best.

Cost efficiency. SaaS applications offer a subscription-based pricing model, which can help the tribal government reduce their upfront capital expenditures on IT infrastructure, software licenses, and maintenance. This allows for a more flexible, predictable, and scalable cost structure.

Scalability. SaaS applications can easily scale to accommodate growth in users, data, and functionality, ensuring the tribal government can adapt to increasing demands without the need for expensive and time-consuming infrastructure upgrades.

Environmental benefits. SaaS applications help reduce the environmental impact of IT infrastructure, as there is less need for physical servers and other hardware. This can also contribute to the tribe's sustainability goals.

Tribal Platforms 4.0 application capabilities enabled with specific prerequisites and recommendations for each Microsoft platform solution.

Legend: ● Prerequisite   ◆ Recommended   ★ Optional Add-on

Team scenario	App	Capability	Microsoft 365*			Power Platform						Microsoft Dynamics 365**			Integration		Microsoft Azure				
			Microsoft Teams	Microsoft Office 365	Microsoft SharePoint	Power Apps	Power Automate***	Power Portal****	Power BI	Power Virtual Agent	Power AI Builder	Customer Service	Resource Scheduling	Finance	Finance	On-Premises Applications	Azure Active Directory	Azure B2C	Cognitive Services	Data Lake & Synapse	API Management
Member and Program Management	Enrollment	Member Insights	◆	◆	◆	●	●		◆			★		★	★	★	●			★	★
		Member Collaboration	◆	●	◆	●	●	◆		★	★						●	◆	★		
		ID Card			◆	●	●										●				
		Applications	◆	◆	◆	●	●	◆	◆	★	★	★					●	◆	★	★	
		Eligibility	◆	◆	◆	●	●									★	●			★	★
		Program Analytics				●	●		●								●			★	
Family and Child Services Case Management	Family Wellness	Case Management	◆	◆	◆	●	●	◆	◆	★		★	★	★	★	★	●	◆	★	★	★
		Outcome based Care			◆	●	●		◆								●			★	

Court Case Management	**Tribal Court**	Care team collaboration	♦	●	♦	●	●	♦		✦							●	♦		
		Case Management	♦	●	♦	●	●	✦	♦		✦	✦	✦	✦	✦	●	✦		✦	✦
		Document Management			●	●	●			✦						●		✦		
		Case Collaboration	♦	●	♦	●	●	♦								●	♦			
Financial Payment Management	**Distribution Payments**	Recurring Payments		✦	♦	●	●	✦	✦			♦	♦		●	✦		✦	✦
		One-time Payments		✦	♦	●	●	✦	✦			♦	♦		●	✦		✦	✦
		Withholdings, Garnishments		✦	♦	●	●	✦	✦			♦	♦		●	✦		✦	✦

*Microsoft 365 products include Office 365, Teams, and SharePoint
**Dynamics 365 user license prerequisite for Administrator users only
***Power Automate is a freemium business model; based on the number of user licenses purchased.
****Power Portal pricing is based on anonymous and authenticated user login volume

∆RCTIC IT

Tenacious Ingenuity®