Department of Human Services
Oregon Health Authority

2017 Joint Committee on Ways and Means

Subcommittee on Human Services

June 6, 2017

Clyde Saiki , Department of Human Services Director

Eric Smith, IE&ME Independent Project Director

Nate Singer, IE&ME Business Director

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Roadmap to Integrated Eligibility for Oregon

ONE Integrated Eligibility & Medicaid Eligibility Project

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Presentation Topics

- History
- Vision for Integrated Eligibility
- Scope
- Schedule
- Budget
- Risks, Issues and Challenges
- Next Steps

The History

CoverOregon

2013-2014

- Oct 2013: Cover Oregon system; state based exchange
- Nov 2014: Oregon moved to the federal exchange

ONE

2015

- Jan 2015: MAGI Medicaid Project (ONE) initiated
- Jul 2015: A87 Cost Allocation Exception extended to 12/31/2018
- Jul 2015: IE&ME planning began
- Dec 2015: ONE Worker Portal implemented

IE&ME Project ONE Enhancements

2016

- ONE ongoing enhancements
- Feb 2016: Cover Oregon system decommissioned
- Feb 2016 / Oct 2016: Applicant Portal implemented
- Sep 2016: IE&ME Fit Gap completed

IE&ME Project ONE Enhancements

2017

- ONE ongoing enhancements
- IE&ME design / development
- OHA transfers MAGI Medicaid operations to DHS

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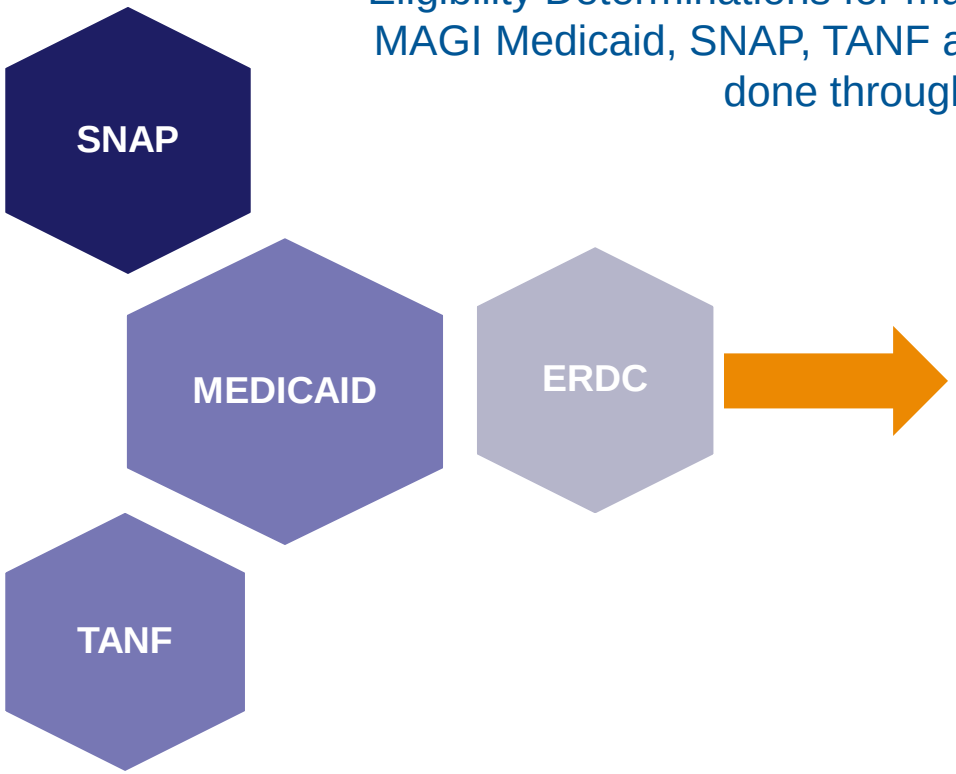
Oregon's Vision for Integrated Eligibility

Eligibility Determinations for multiple programs (MAGI and non-MAGI Medicaid, SNAP, TANF and Childcare programs), will be done through one system



- Improved & simplified access for Oregonians
- Operating efficiencies, effectiveness and accuracy

What we are trying to do from a system perspective

- Today if an individual or family applied for Medical, SNAP, and TANF benefits they would have separate cases set up for each program
- The information may be captured by different workers and requested at different times
- The information may be stored in different systems in different ways
- The following are examples of what screens workers see today:

  - Note: all data shared below is Test Data from Test Environments and not actual individual's information

SNAP

```
1 - DHR (127.0.0.1)
File  Edit  Transfer  Fonts  Options  Macro  View  Window  Help
PA1 PA2 PA3  ENT CLR

FSUP      T3404Y222                FastPath        EB        Next Code:
Case No: T34-04-Y222 Name: TAYLOR, JOHN                Br: 3404  Reg: 6 Agy: AFS
Trans:                  D-Eff:                                  Wrk Id: SB
Start Cert: 090117 Expr Cert: 083118 Reason:    Option: 1 Categ: NA Lang: EN
Mand Rpt: S Form: N Rept: N Ben Per:      Rpt Exp: 022818 Fil Dt: 090117 Pror N
Rel ATP:    N/C Dollar Amount:         Ben MO-YR:      Cat El: C    Prnt:
Tot Rsrc       .00 Authorization #           # To Be Replaced
 FilGrp 02 BenGrp: 02   Shelt:  750.00 Util:  449.00-F Print Id: N  Hold Cd:
Bypass: S     Prg:    Meals:    Cnty: 047 HH Types:
Home Addr: 301-A                     City St: SALEM OR         Zip: 97301
Mail Addr:                           City St:                  Zip:
Auth Rep Cd: P Name:  SMITH, SALLY              Area Cd: 971 Phone: 8675309
Setup Date: 06/02/17 Orig Cert:   09/01/17 # Certs:   01              DD: N
HH Stat: OP Stat Reas:    Excp Reas:     Lst Actn: 10/03/17 ADJ
Last Eff: 09/01/17            Last Oper Id: HWTSTJ4  Ovp Bal:
Pro Rata Amt:         Supp Amt:
Max Allot:  357.00 30% NFSI:   86.00 Ovp Recov:         Net Allot:  271.00
Per   Tot EML Tot Oth Tot Comb Std D  EML Dis Net CC  Adj Inc SH Off  N.F.S.I.
09-17 1200.00     .00 1200.00  157.00  240.00     .00  803.00  517.00  286.00
09-17 1200.00     .00 1200.00  157.00  240.00     .00  803.00  517.00  286.00



F1=Help F3=Exit F5=Refresh  F6=FstPth   F9=Save  F15=Manl  F21=DQ
4-©              1 Sess-1    127.0.0.1                HTCPWSNY        1/69
```

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SNAP - Continued

1 - DHR (127.0.0.1)

File Edit Transfer Fonts Options Macro View Window Help

```
FSUP                                                    Next Code:
Case No: T34-04-Y222 Name: TAYLOR, JOHN                Br: 3404      Categ: NA
                                                 Bypass: S
Trans:                  D Eff:                      FilGrp 02 BenGrp: 02
 TC PN MT Name                        SSN      DOB  SX R FSET S Wrk Reg PA Case
P   01 HH TAYLOR, JOHN               T3404Y222 010182 M W      F 4
I   01  Item#: 01  Inc Ded: I  Type: EML  Amount: 1200.00   Ben#: 600 X 2
P   02 AD TAYLOR, TRACY                        010190 F W      N L

F23=SDdet F16=OPDS          F5=FSRN
4-©                1 Sess-1    127.0.0.1                HTCPWSNY       § 1/70
```

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Medical – Not in ONE currently

1 - DHR (127.0.0.1)

File Edit Transfer Fonts Options Macro View Window Help

```
UCMS     JK3395                                          Fast Path        EB
                                          Next Per            Rel    Byp Prcs
Case Name      TAYLOR, JOHN                 Auth Repr    R SMITH, SALLY
Res Str    301 A                         City/St  SALEM   OR           Zip 97301
  Fips Cnty  047                             Tele  971 8675309
Mail Str                                 City/St                        Zip
 Prog    Br  Case  SCD   WCMI Case Stat   Last Chg                    Lang EN
  P2    3404 JK3395 6
      Incm NEW        Req Date 03-01-17    Tot Rsrc    0.00
 Eff Date 03-01-17 # Hse 02 # OHP 00   MED prg/#  AMO 02     00     00     00
      Reas      Ntce      Prnt      943 Print N   Load SB   Serv Wkr
CC Wrk Hrs    0      # ERDC 00
                                              Ovp:     0.00 Prev Ovp:     0.00
Act Prov  N TANF Sit End            Pre Pay            0.00
APR                        Prem Stat:   Waiv    Disq
Rvw  NRD       Pkt# 00                    Medl Rvw       DD:
 PL  Ingnt    Recip                         N/R                 C/D
   A   AD  TAYLOR, JOHN                 AMO HPM              AMO
   B   AD  TAYLOR, TRACY                AMO                  AMO


04 NO ERRORS ON MASTER - PRESS F9 TO SAVE
 F3=EXIT F6=FAST PATH F9=SAVE F15=MANL F18=COPY
F1=Hlp F2=Add F7=Bkwd F8=Fwd          F16=Alias/Updt F23=PCMS F24=CMUP
4-©              1 Sess-1    127.0.0.1                HTCPWSNY       § 2/64
```

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Medical – Not in ONE currently - Continued

1 - DHR (127.0.0.1)

File Edit Transfer Fonts Options Macro View Window Help

```
WCIW033C                CM Case Member Update              06/02/2017 09:52 am

Fast Path ____ EB    Case Nmbr JK3395    Next Per _
   PL    SSN       Last Name            First Name          MI Title  DOB      S R
 IG Py      Prime  Medl Elig  MIB TPL JS Exmp Grade    Mom Dad  Excp FI  GC Eth
 . A ___________ TAYLOR               JOHN                 _ ___ 01/01/1982 M W
  AD X   NJ200W8F S 03/01/2017 0    0 _   _      __      _   _    _   _   _   N
  C/D AMO ___ ___ ___ ___ ___ ___ ___        Action N Registered: R
  N/R AMO 02/2018 _______ ____________ N/R HPM C       1200.00 600 X 2
 . B ___________ TAYLOR               TRACY                _ ___ 01/01/1990 F W
  AD _   NJ200W8E S 03/01/2017 0    0 _   _      __      _   _    _   _   _   N
  C/D AMO ___ ___ ___ ___ ___ ___ ___        Action N Registered: R
  N/R AMO 02/2018 _______ ____________ N/R ___ _______ _______ ____________
   _ ___________ ___________________ ____________________ _ ___ __________ _ _
  __ _   ________ _ __________ 0   N _   _      __      _   _    _   _   _   _
  C/D ___ ___ ___ ___ ___ ___ ___ ___        Action N Registered: N
  N/R ___ _______ _______ ____________ N/R ___ _______ _______ ____________
   _ ___________ ___________________ ____________________ _ ___ __________ _ _
  __ _   ________ _ __________ 0   N _   _      __      _   _    _   _   _   _
  C/D ___ ___ ___ ___ ___ ___ ___ ___        Action N Registered: N
  N/R ___ _______ _______ ____________ N/R ___ _______ _______ ____________

F1=Help F2=Add F6=Fast Path F7=Bkwd F8=Fwd F9=Save(RU) F11=Get Prsn F13=Race
F14=Delete Per F16=Alias/Updt F19=Left F20=Right F21=Sort PL F22=UCMS F23=PCMS
4-©              1 Sess-1    127.0.0.1                HTCPWSNY          3/12
```

Medical – Not in ONE currently - Continued

1 - DHR (127.0.0.1)

File Edit Transfer Fonts Options Macro View Window Help

```
SCMS     JK3395                          Fast Path:          EB
                        CMS Case Summary Display
    Case Status:  VP  OHP: #HPN-Prem    #Med Std    Inc          Prem
 Case   Pgm    Adult  Ch      ERDC                HIP        HIP
 Desc   Stat   Recip          Copay               Need       Chk
 AMO     VP       2    0       0.00               0.00      0.00


    Std      Spl      Othr        Tot  Tot Adj   Ovp          Ben    Cr    Ben
    Need     Need     Need        Need  Income  Recov         Amt    Deb   Chk Amt
 1801.00     0.00     0.00   0 1801.00 1200.00    0.00          0.00         0.00


 Earn      Cntbl       Tot       Adj
 Rpt       Earn        Ded       Earn
 00-00      0.00       0.00      0.00


 EBT CASE INFORMATION SUCCESSFULLY UPDATED AND SENT TO VENDOR




  F1=Help            F3=EXIT F6=FAST PATH     F9=SAVE F17=W238
4-©                1 Sess-1    127.0.0.1                    HTCPWSNY          1/10
```

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TANF

```
1 - DHR (127.0.0.1)
File  Edit  Transfer  Fonts  Options  Macro  View  Window  Help
PA1 PA2 PA3  ENT CLR

UCMS     JK3396                                          Fast Path        EB
                                          Next Per            Rel   Byp Prcs
Case Name      TAYLOR, JOHN                Auth Repr    R SMITH, SALLY
Res Str    301 A                         City/St  SALEM    OR          Zip 97301
  Fips Cnty   047                          Tele  971 8675309
Mail Str                                 City/St                        Zip
 Prog    Br  Case   SCD    WCMI Case Stat    Last Chg                  Lang EN
  82    3404 JK3396 4
      Incm NEW         Req Date 03-01-17     Tot Rsrc     0.00
 Eff Date 03-01-17 # Hse 03 # OHP 00    MED prg/#       00      00      00      00
      Reas       Ntce       Prnt       943 Print N    Load SB    Serv Wkr SB
CC Wrk Hrs     0       # ERDC 00
                                                Ovp:      0.00 Prev Ovp:      0.00
Act Prov   N TANF Sit End             Pre Pay            0.00
APR                          Prem Stat:    Waiv     Disq
Rvw 02/28/2018 Pkt# 1A                       Medl Rvw NRD    DD:
 PL   Ingnt     Recip                          N/R                  C/D
   A    AD   TAYLOR, JOHN                 TLY EML                ELI NMD
   B    AD   TAYLOR, TRACY                TLY                    INC NMD
   C    MO   TAYLOR, ALICIA D                                    NMD
   D    CH   TAYLOR, BABY                                        NMD
04 NO ERRORS ON MASTER - PRESS F9 TO SAVE
 F3=EXIT F6=FAST PATH F9=SAVE F15=MANL F18=COPY
F1=Hlp F2=Add F7=Bkwd F8=Fwd            F16=Alias/Updt F23=PCMS F24=CMUP
4-©                1 Sess-1     127.0.0.1                    HTCPWSNY        § 2/64
```

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TANF - Continued

1 - DHR (127.0.0.1)

File Edit Transfer Fonts Options Macro View Window Help

```
WCIW033C                CM Case Member Update              06/02/2017 10:05 am

Fast Path _____ EB_    Case Nmbr JK3396    Next Per _
   PL    SSN       Last Name              First Name           MI Title  DOB      S R
 IG Py      Prime  Medl Elig  MIB TPL JS Exmp Grade    Mom Dad  Excp FI  GC Eth
 . A ___________ TAYLOR                JOHN                  _ ___ 01/01/1982 M W
  AD X   NJ200W8F _ __________ 0   0 W   _       12      _   _    _   1   _   N
  C/D ELI NMD ___ ___ ___ ___ ___ ___       Action N Registered: R
  N/R TLY 02/2018 _______ _____________ N/R EML C       _200.00 _____________
 . B ___________ TAYLOR                TRACY                 _ ___ 01/01/1990 F W
  AD _   NJ200W8E _ __________ 0   0 C   M       12      _   _    _   N   _   N
  C/D INC NMD ___ ___ ___ ___ ___ ___       Action N Registered: R
  N/R TLY 02/2018 _______ _____________ N/R ___ _______ _______ _____________
 . D ___________ TAYLOR                BABY                  _ ___ 01/01/2017 F W
  CH _   NJ200W8G _ __________ 0   0 _   _       __      C   A    _   1   _   N
  C/D NMD ___ ___ ___ ___ ___ ___ ___       Action N Registered: R
  N/R ___ _______ _______ _____________ N/R ___ _______ _______ _____________
 . C 540-15-0912 TAYLOR                ALICIA                D ___ 11/30/1980 F W
  MO _   AV73757B _ __________ 0   0 _   _       __      _   _    _   1   _   _
  C/D NMD ___ ___ ___ ___ ___ ___ ___       Action N Registered: R
  N/R ___ _______ _______ _____________ N/R ___ _______ _______ _____________

F1=Help F2=Add F6=Fast Path F7=Bkwd F8=Fwd F9=Save(RU) F11=Get Prsn F13=Race
F14=Delete Per F16=Alias/Updt F19=Left F20=Right F21=Sort PL F22=UCMS F23=PCMS
4-©              1 Sess-1    127.0.0.1                HTCPWSNY          3/12
```

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TANF - Continued

1 - DHR (127.0.0.1)

File Edit Transfer Fonts Options Macro View Window Help

```
SCMS    JK3396                          Fast Path:          EB
                        CMS Case Summary Display
    Case Status:  CP  OHP: #HPN-Prem    #Med Std    Inc          Prem
 Case   Pgm   Adult  Ch     ERDC                HIP       HIP
 Desc   Stat  Recip         Copay               Need      Chk
 TNF    CP      2    1       0.00               0.00     0.00


    Std      Spl      Othr       Tot  Tot Adj   Ovp          Ben   Cr   Ben
    Need     Need     Need       Need  Income  Recov        Amt   Deb  Chk Amt
  506.00     0.00     0.00  0  506.00  100.00    0.00        406.00      406.00


 Earn      Cntbl       Tot       Adj
 Rpt       Earn        Ded       Earn
 03-17    200.00    100.00    100.00


 EBT CASE INFORMATION SUCCESSFULLY UPDATED AND SENT TO VENDOR




  F1=Help            F3=EXIT F6=FAST PATH     F9=SAVE F17=W238
4-©                1 Sess-1    127.0.0.1                HTCPWSNY        1/10
```

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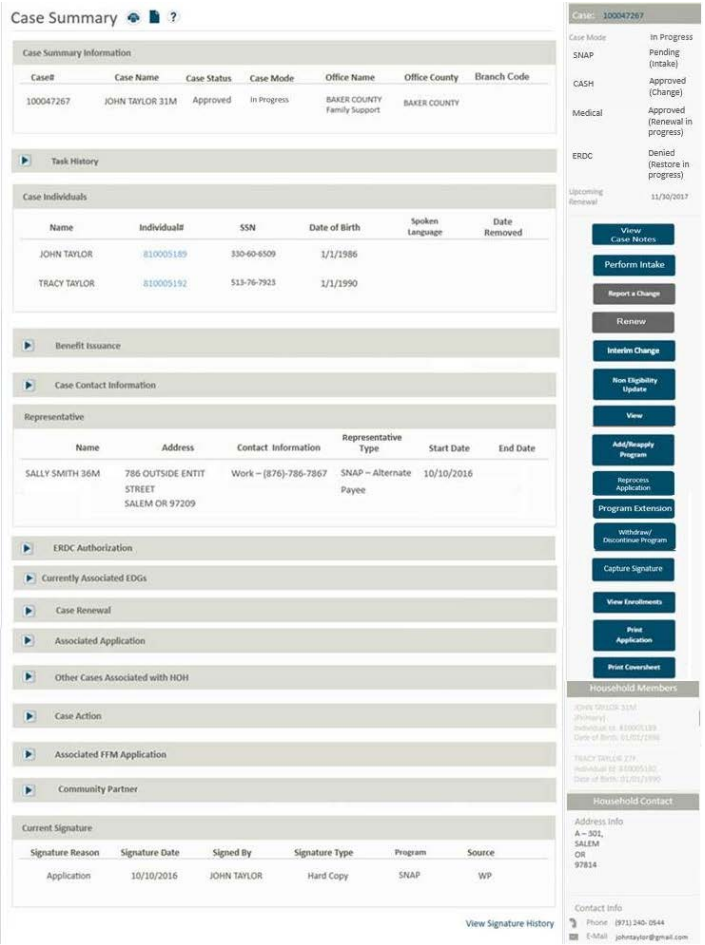
What it may look like in ONE



Case Summary

Case Summary Information

Case#	Case Name	Case Status	Case Mode	Office Name	Office County	Branch Code
100047267	JOHN TAYLOR 31M	Approved	In Progress	BAKER COUNTY Family Support	BAKER COUNTY	

Task History

Case Individuals

Name	Individual#	SSN	Date of Birth	Spoken Language	Date Removed
JOHN TAYLOR	810005189	330-60-6509	1/1/1986		
TRACY TAYLOR	810005192	513-76-7923	1/1/1990		

Benefit Issuance

Case Contact Information

Representative

Name	Address	Contact Information	Representative Type	Start Date	End Date
SALLY SMITH 36M	786 OUTSIDE ENTIT STREET SALEM OR 97209	Work – (876)-786-7867	SNAP – Alternate Payee	10/10/2016	

ERDC Authorization

Currently Associated EDGs

Case Renewal

Associated Application

Other Cases Associated with HOH

Case Action

Associated FFM Application

Community Partner

Current Signature

Signature Reason	Signature Date	Signed By	Signature Type	Program	Source
Application	10/10/2016	JOHN TAYLOR	Hard Copy	SNAP	WP

View Signature History

Case: 100047267

Case Mode	In Progress
SNAP	Pending (Intake)
CASH	Approved (Change)
Medical	Approved (Renewal in progress)
ERDC	Denied (Restore in progress)
Upcoming Renewal	11/30/2017

View Case Notes
Perform Intake
Report a Change
Renew
Interim Change
Non Eligibility Update
View
Add/Reapply Program
Reprocess Application
Program Extension
Withdraw/ Discontinue Program
Capture Signature
View Enrollments
Print Application
Print Coversheet

Household Members

Household Contact

Address Info
A – 321,
SALEM
OR
97814

Contact Info
Phone (971) 240- 0544
E-Mail johntaylor@gmail.com

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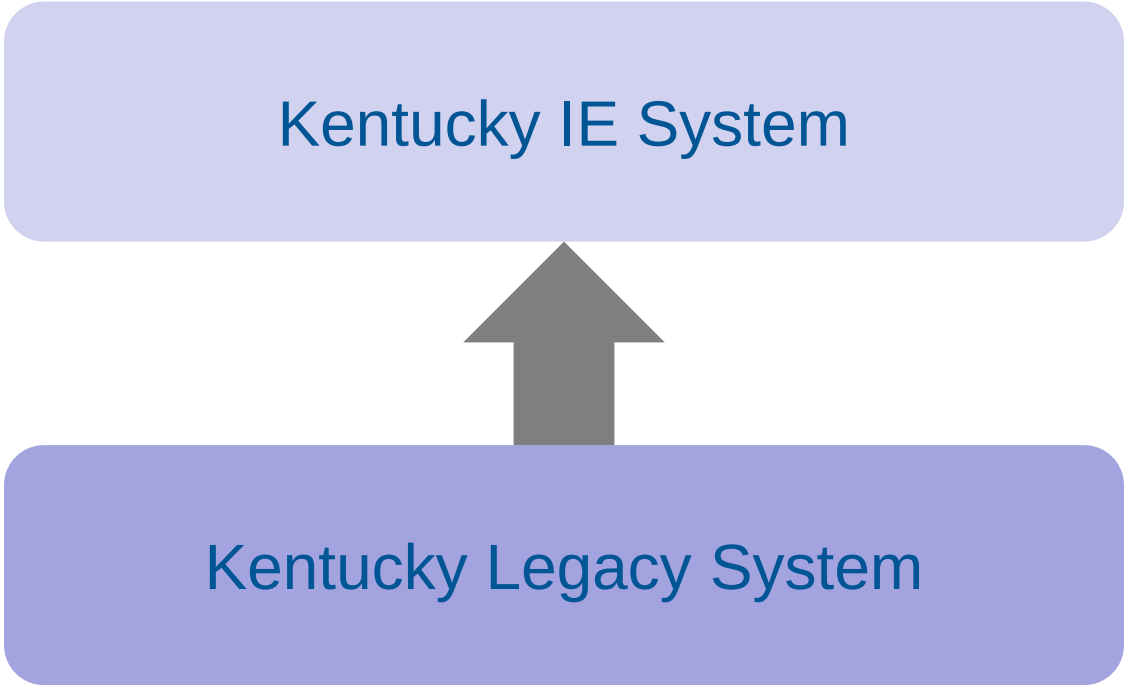
Changes to Scope (given what we know today…)

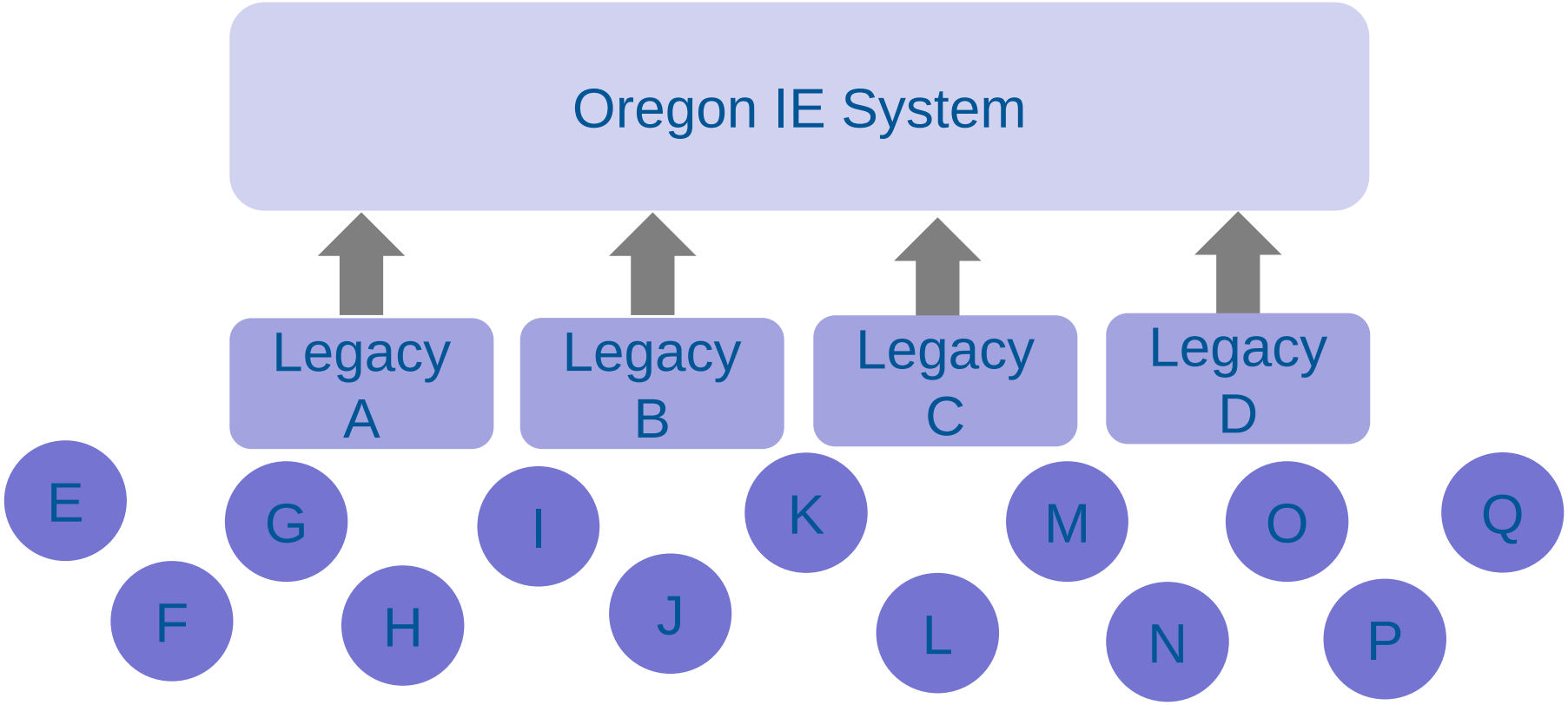
- Changing Oregon's method of determining eligibility aligns better with transfer solution; most states integrate eligibility
- The technical solution (e.g. transfer system) will need less customization then expectations coming out of Fit Gap
- The identification of the scope of the legacy system changes **has greatly increased complexity**; impact to legacy systems is much greater than originally thought
- Data conversion from four separate legacy systems is complex and risky
- The project now has oversight of the move to the new integrated service model (move of Medicaid determinations for the MAGI population from OHA to DHS)
- The project now has oversight of Disaster Recovery efforts; these efforts are too large to be handled as a Maintenance and Operations activity

Scope – Kentucky System (model for Oregon)



- Business process already integrated
- Single legacy system retired after cutover

Scope – Oregon System



- Processes siloed; *becoming* integrated
- Legacy systems <u>*remain*</u> after cutover

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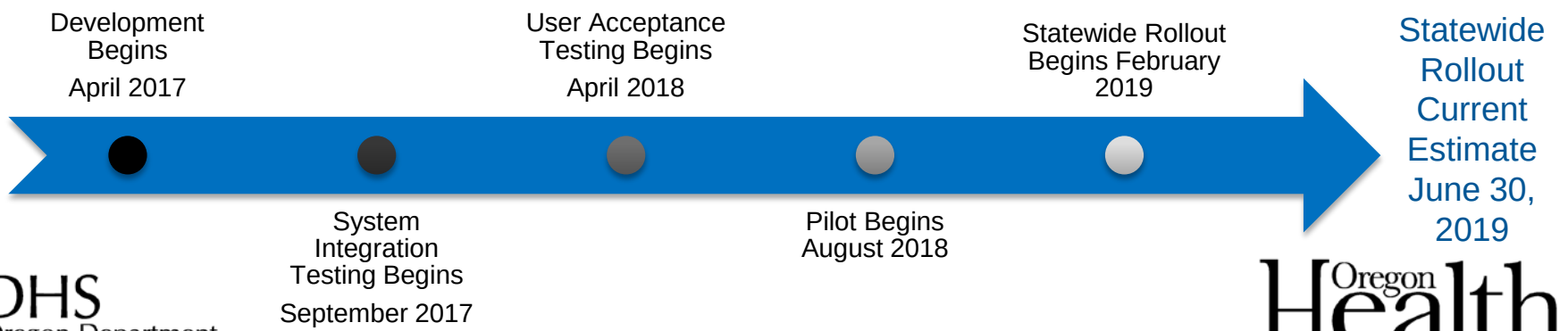
Impact to Schedule (given what we know today…)

- We're now through Fit Gap and are in the Design phase; we're learning more and more about what it will take to implement this in Oregon
- We've talked to over 20 other states about their implementations, and have adjusted our timelines to what they said they would do differently
- Oregon's rules and policies around non-MAGI, ERDC, TANF and SNAP are requiring more customization to the transfer system than originally anticipated
- We've recognized (through OHA's adoption of ONE) that we need to give more time to the business process and organizational change needed for adoption of a large, complex system
- Data conversion (or not to convert) will likely require more manual intervention than we originally anticipated
- We're moving to an integrated service model now, rather than later
- Legacy system changes will be more challenging than originally thought



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Total estimated project cost (given what we know today…)

Stage Gate 2	Stage Gate 3	Current Projections
Total Funds: $126.1 million	Total Funds: $177 million	Total Funds: $241.7 million
Federal Funds: $107.1 million	Federal Funds: $144 million	Federal Funds: $186.3 million
State Funds: $19 million	State Bonds: $25 million	State Bonds: $52.4million
	General Funds: $8 million	General Funds: $3 million

Changes between Stage Gate 2 and 3

- Additional costs negotiated with System Integrator and Quality Assurance vendors
- Additional costs associated with staffing, legacy, and training
- Additional costs associated with assumed costs for Maintenance and Operations

Changes between Stage Gate 3 and Current Projections

- See list of differences in 2017-2019 POP on next slide

What will the "ask" be in 2017-19 POP 201?

Original 17-19 POP Request	Current 17-19 POP Request	Difference
Federal Funds: $101.8 million	Federal Funds: $147.5 million	Federal Funds: $45.7 million
State Bonds: $18.2 million	State Bonds: $45.6 million	State Bonds: $27.4 million
General Funds: $7.6 million	General Funds: $2.3 million	General Funds: ($5.3) million
Other Fund Limitation: $10.75 million	Other Fund Limitation: $13.6 million	Other Fund Limitation: $2.85 million
Debt Services: $4.35 million	Debt Services: $10.5 million	Debt Services: $6.15 million
Total Funds: $142.7 million	**Total Funds: $219.6 million**	**Total Funds: $76.9 million**

Changes between Original POP Request and Current POP Request (2017-2019 POP)

- Additional six months of Design/Development/Implementation (DDI) timeframe versus maintenance and operation costs, plus Legacy and DR work ($34M)
- Adding 10% contingency to the project ($13M)
- Adding Department cost allocation to the project ($5M) ; Increased OF limitation ($13.6M)
- Increased staffing based on increased understanding and underestimation around implementation ($5M)
- Increased staffing based on increased understanding and underestimation around Legacy work ($6M)
- Increased staffing based on additional complexity around DR work ($300K)

What will the "ask" be in 2017-19 POP 201?

Position Request
DHS LD Positions: 88
DHS PF Positions: 25
OHA – OIS LD Positions: 37
OHA – OIS PF Positions: 21
OHA – HSD LD Positions 4
Total Positions: 175 Total FTE: 126.04

DHS Positions:
- 15 Limited Duration Trainers
- 6 Permanent Trainers
- 73 Limited Duration staff to support Subject Matter Policy or Business needs
    - 51 of these staff are for pilot and implementation on-site support
- 19 Permanent Positions:
    - Manager to support the BA unit for the ONE system
    - Business Analysts
    - User Acceptance Testing unit
    - Consumer Support Unit

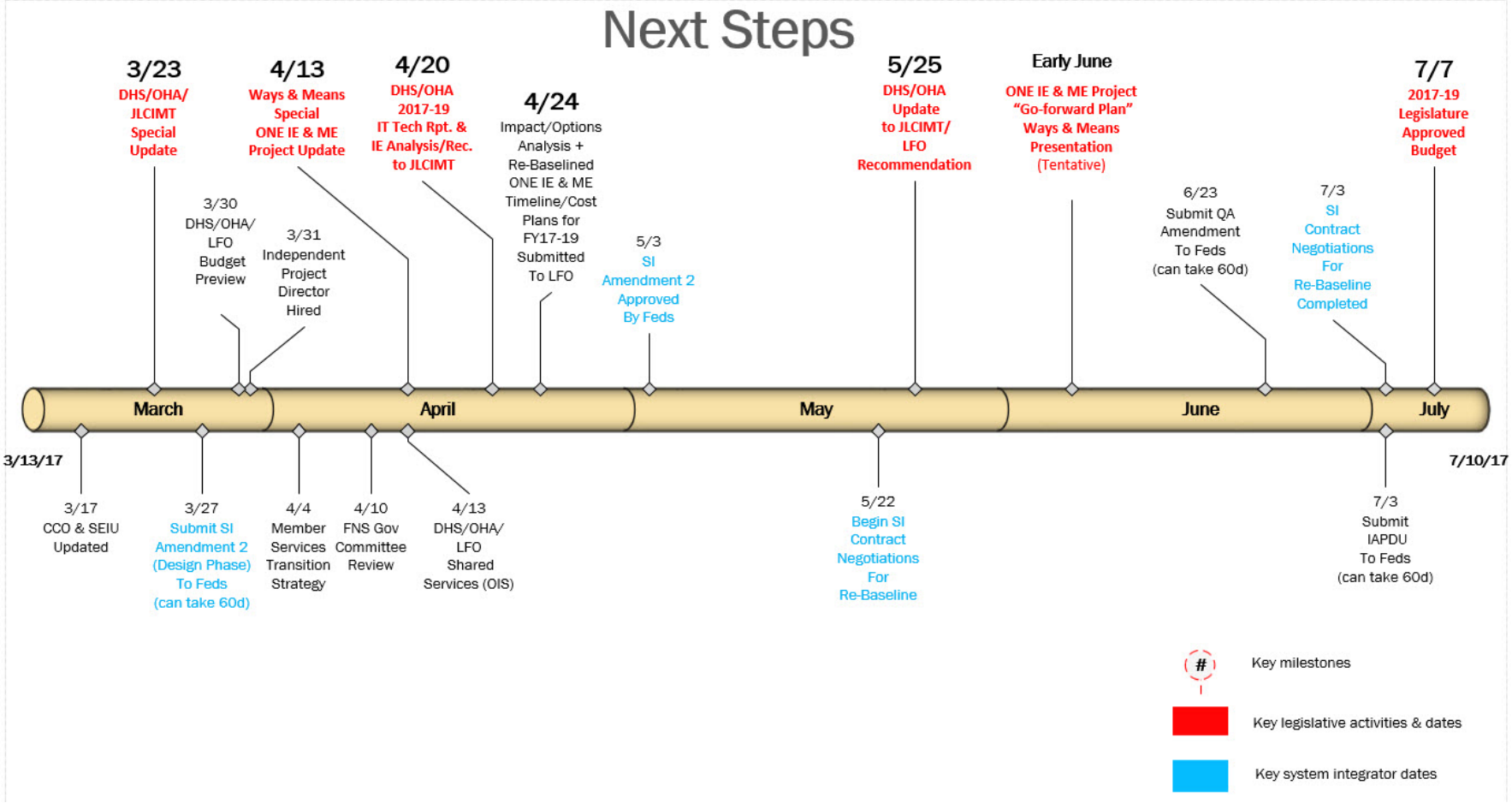
OHA Positions at HSD:
- 4 Limited Duration Positions for Subject Matter Policy or MMIS needs

OHA Positions for OIS:
- 12 Limited Duration Project Managers
- 23 Info System Specialists
- 2 Administrative Support Staff
- 21 Permanent Positions
    - Manager for ongoing technical support
    - Policy Analyst for Contract Support
    - Maintenance and Operation Support unit

What will the Challenges be going forward?

- Legacy system complexity and changes
- Data conversion complexity
- Moving to integrated service delivery model
- People readiness / system adoption
- Finite number of Subject Matter Experts (SMEs)
- Rollout will require running parallel systems
- Organization's capacity to handle a major project given everything else on the plate, budget cuts and impacts of potential PERS reform
- Unknown changes coming from State and Federal legislation
- Project Management Office's ability to keep up with management of the project and with oversight requests

Go Forward Approach



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Thank you

Questions?

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Eric Smith: Eric.Smith@state.or.us
Nate Singer: Nathan.M.Singer@state.or.us