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# Department of Human Services Oregon Health Authority

**2017 Joint Committee on Ways and Means  
Subcommittee on Human Services**

*June 6, 2017*

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*Eric Smith, IE&ME Independent Project Director*

*Nate Singer, IE&ME Business Director*



# Roadmap to Integrated Eligibility for Oregon



*ONE Integrated Eligibility & Medicaid Eligibility Project*

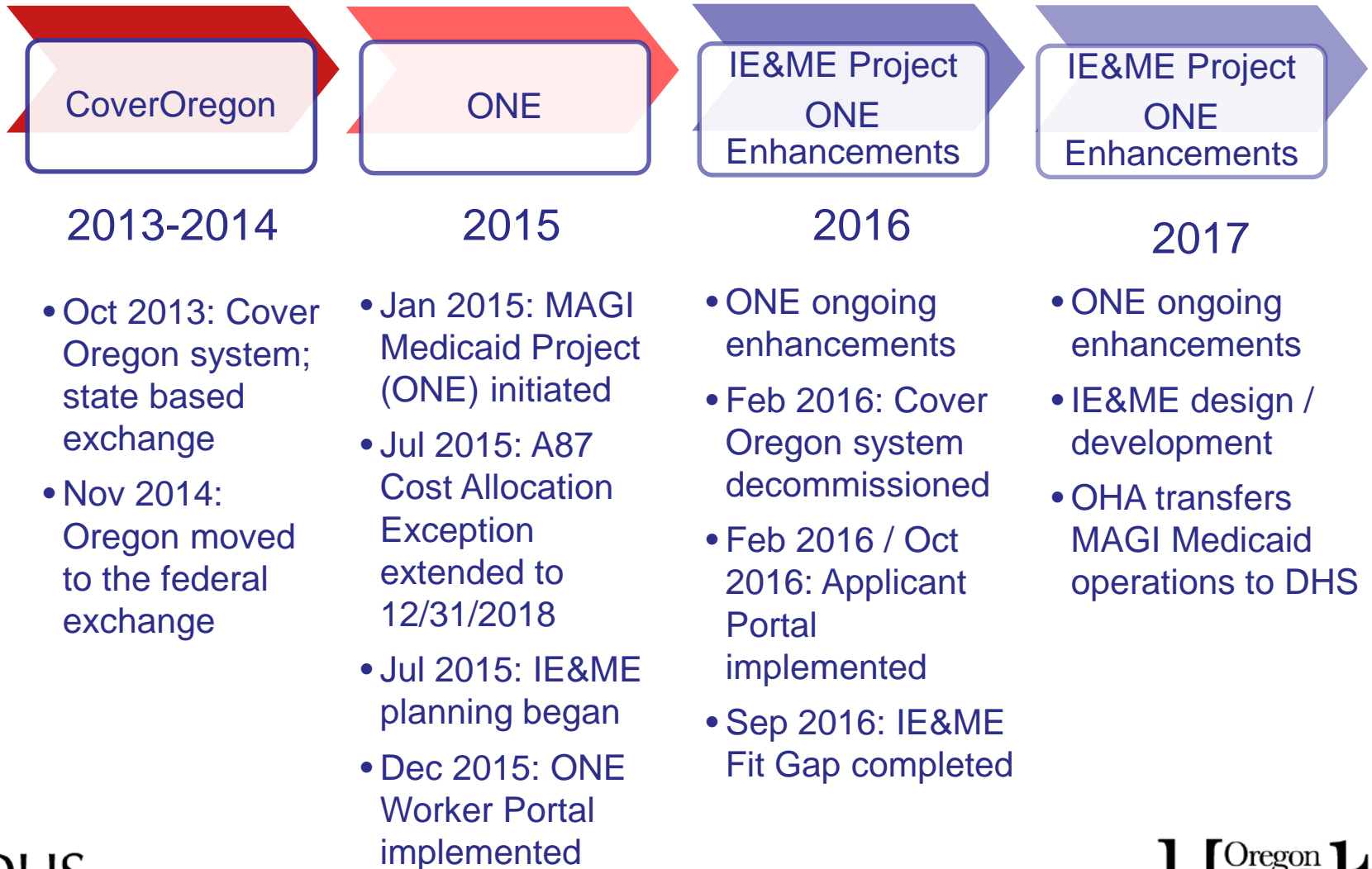


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# Presentation Topics

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

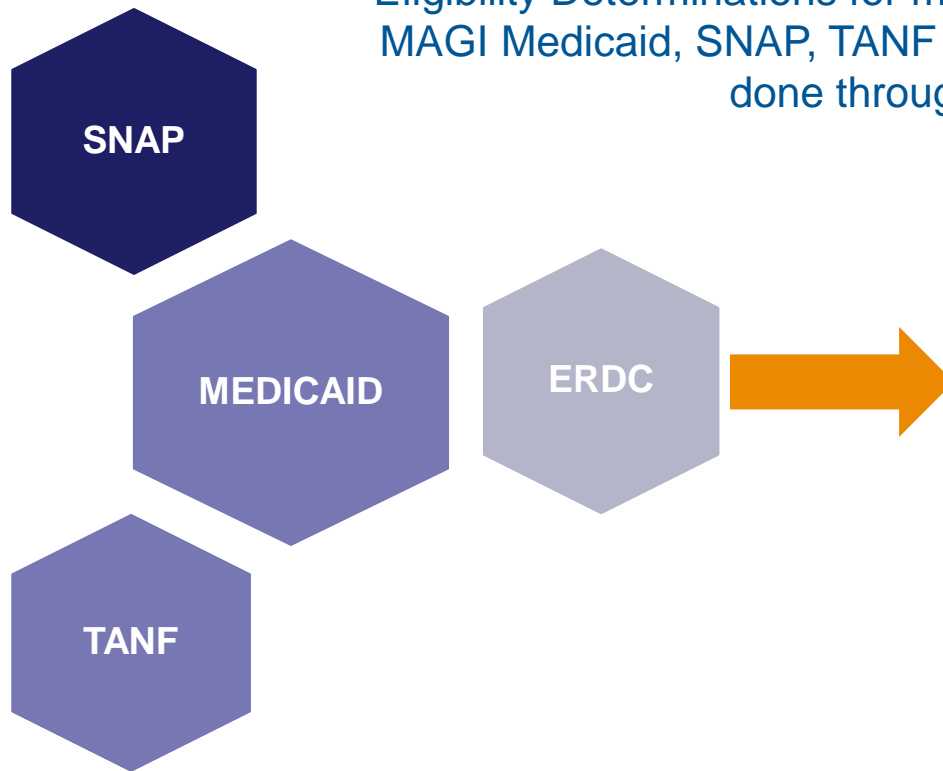
# The History





# 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

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## 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
PAL 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
```

# SNAP - Continued

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



# Medical – Not in ONE currently

```

1 - DHR (127.0.0.1)
File Edit Transfer Fonts Options Macro View Window Help
|| [Icons] | PA1 PA2 PA3 ENT CLR [Icons] | [Icons]
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          HTCPSNY      § 2/64

```

# 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 Action N Registered: R
C/D 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 Action N Registered: R
C/D AMO 02/2018 N/R
0 N Action N Registered: N
C/D N/R
0 N Action N Registered: N
C/D 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
[Icons] PA1 PA2 PA3 ENT CLR [Icons]

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
  
```

# TANF

```

1 - DHR (127.0.0.1)
File Edit Transfer Fonts Options Macro View Window Help
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
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
  
```

# TANF - Continued

```

1 - DHR (127.0.0.1)
File Edit Transfer Fonts Options Macro View Window Help
[Icons: Stop, Start, Copy, Paste, Print, Mouse, Keyboard, Mouse, Mouse, Mouse, Mouse, Mouse, Mouse, Mouse, Mouse, Mouse, Mouse, Mouse]
PA1 PA2 PA3 ENT CLR [Icons: Stop, Start, Mouse, Mouse]

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      NJ200W8F    TAYLOR      JOHN           _ _      01/01/1982 M W
  AD X           _         _         _         _      12           _ 1 _ N
  C/D ELI NMD           _         _         _           Action N Registered: R
  N/R TLY 02/2018           _         _         _           N/R EML C           200.00

  . B      NJ200W8E    TAYLOR      TRACY          _ _      01/01/1990 F W
  AD _           _         _         _         _      12           _  N _ N
  C/D INC NMD           _         _         _           Action N Registered: R
  N/R TLY 02/2018           _         _         _           N/R

  . D      NJ200W8G    TAYLOR      BABY           _ _      01/01/2017 F W
  CH _           _         _         _         _         _     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 _         _         _         _         _           _ 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
  
```

# TANF - Continued

```

1 - DHR (127.0.0.1)
File Edit Transfer Fonts Options Macro View Window Help
[Icons] PA1 PA2 PA3 ENT CLR [Icons] 0 [Icons]

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
  
```

# 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

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 FTM 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](#)
- [Intake Change](#)
- [Non Eligibility Update](#)
- [View](#)
- [Add/Reapply Program](#)
- [Reopen Application](#)
- [Program Extension](#)
- [Withdraw/Discontinue Program](#)
- [Capture Signature](#)
- [View Enrollments](#)
- [Print Application](#)
- [Print Case Sheet](#)

#### Household Members

JOHN SMITH 33M  
Individual #: 810005189  
Date of Birth: 01/01/1986

TRACY SMITH 27F  
Individual #: 810005192  
Date of Birth: 01/01/1990

#### Household Contact

Address Info  
A-302,  
SALEM  
OR  
97314

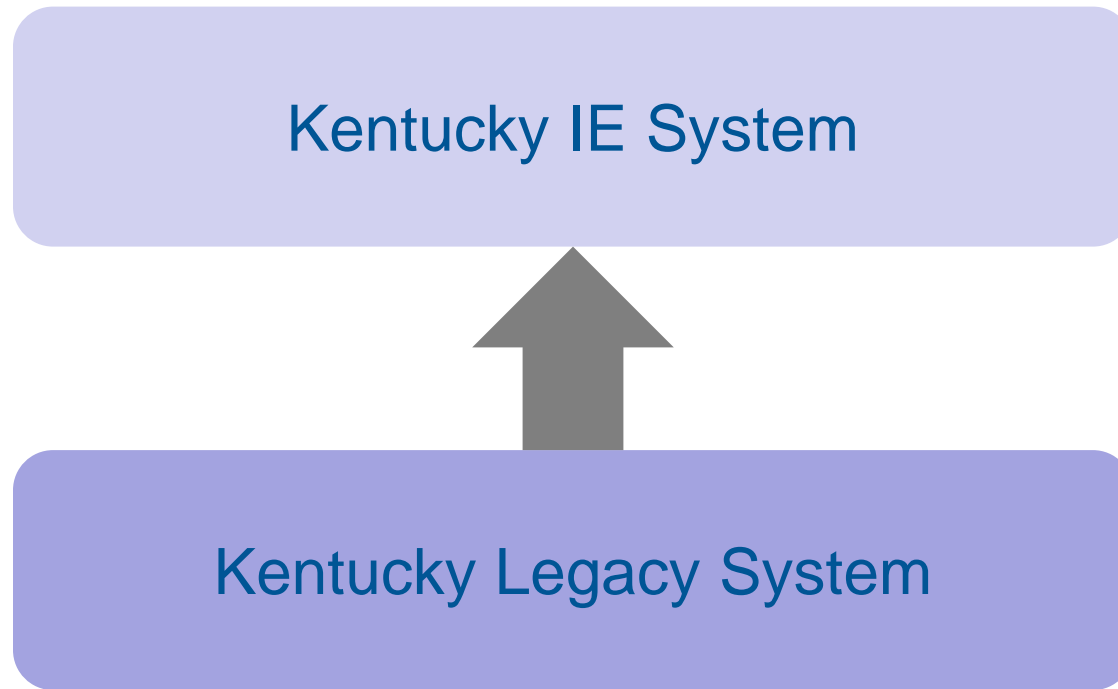
Contact Info  
Phone: (871) 240-1644  
E-Mail: johnstaylor@gmail.com

## 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 than 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

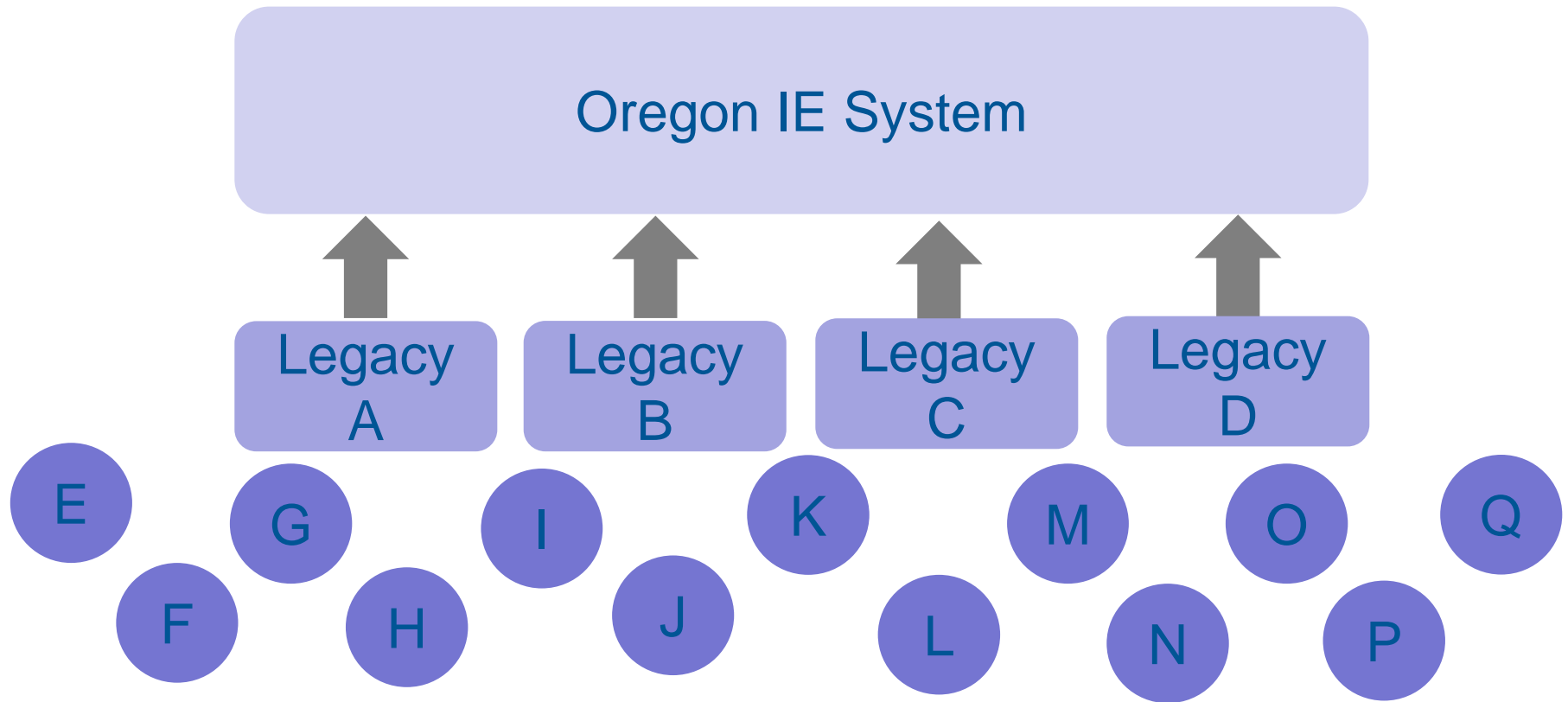


## Scope – Kentucky System (model for Oregon)



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

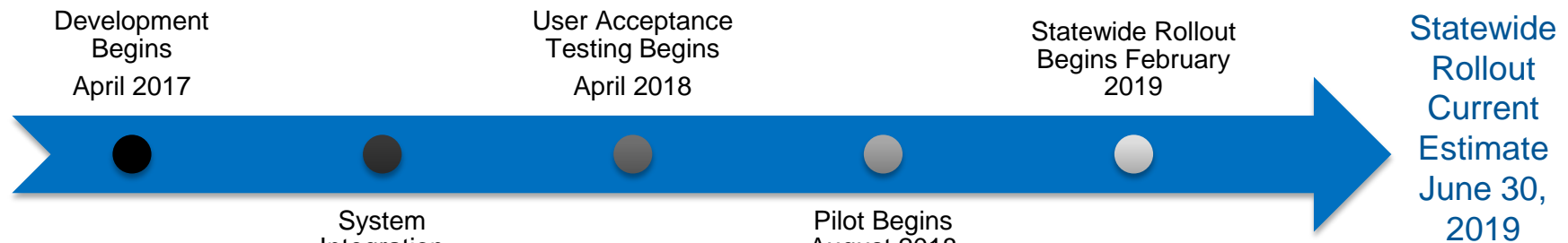
## Scope – Oregon System



- Processes siloed; *becoming* integrated
- Legacy systems remain after cutover

## 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



# 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
<b>Total Funds: \$142.7 million</b>	<b>Total Funds: \$219.6 million</b>	<b>Total Funds: \$76.9 million</b>

## 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
<b>Total Positions: 175</b>
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:

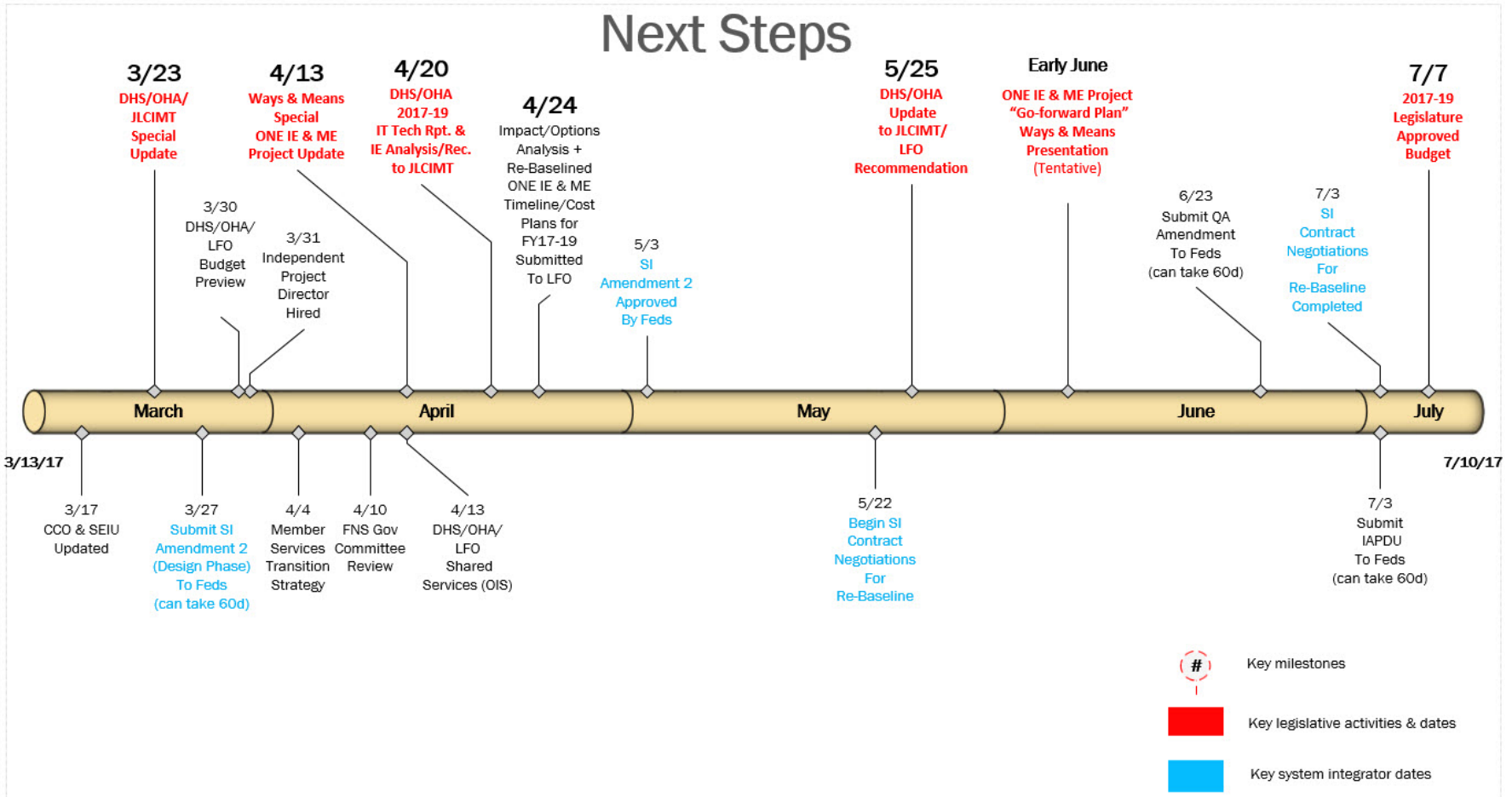
- 12 Limited Duration Project Managers
- 23 Info System Specialists
- 2 Administrative Support Staff
- 21 Permanent Positions
  - Manager for ongoing technical support
  - Policy Analyst for Contract Support
  - Maintenance and Operation Support unit

# 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](mailto:Eric.Smith@state.or.us)**

**Nate Singer: [Nathan.M.Singer@state.or.us](mailto:Nathan.M.Singer@state.or.us)**