Shared Services

Dr. Reginald Richardson, Deputy Director, DHS
Don Erickson, Assistant Deputy Director, DHS
Eric Moore, Chief Financial Officer, DHS
Mark Fairbanks, Chief Financial Officer, OHA
Kristen Duus, Director, Office of Information Services, OHA

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DHS
Oregon Department
of Human Services

Oregon Health Authority

Presentation agenda

1. Shared Services Overview
2. DHS Shared Services
3. DHS Policy Option Packages
4. OHA Shared Services
5. OHA Policy Option Packages
6. Summary

Shared Services history

- Launched in July 2011 when several DHS and other agency programs were combined to create the Oregon Health Authority (OHA)

- DHS and the new OHA decided to share services to save dollars, time and workforce

- Business services were analyzed by an outside expert to determine:

  – Should a service be shared?

  – In which agency should a shared service be placed?

- DHS and OHA jointly manage Shared Services

Oregon Health Authority was created by HB 2009 and opened in July 2011

Governance
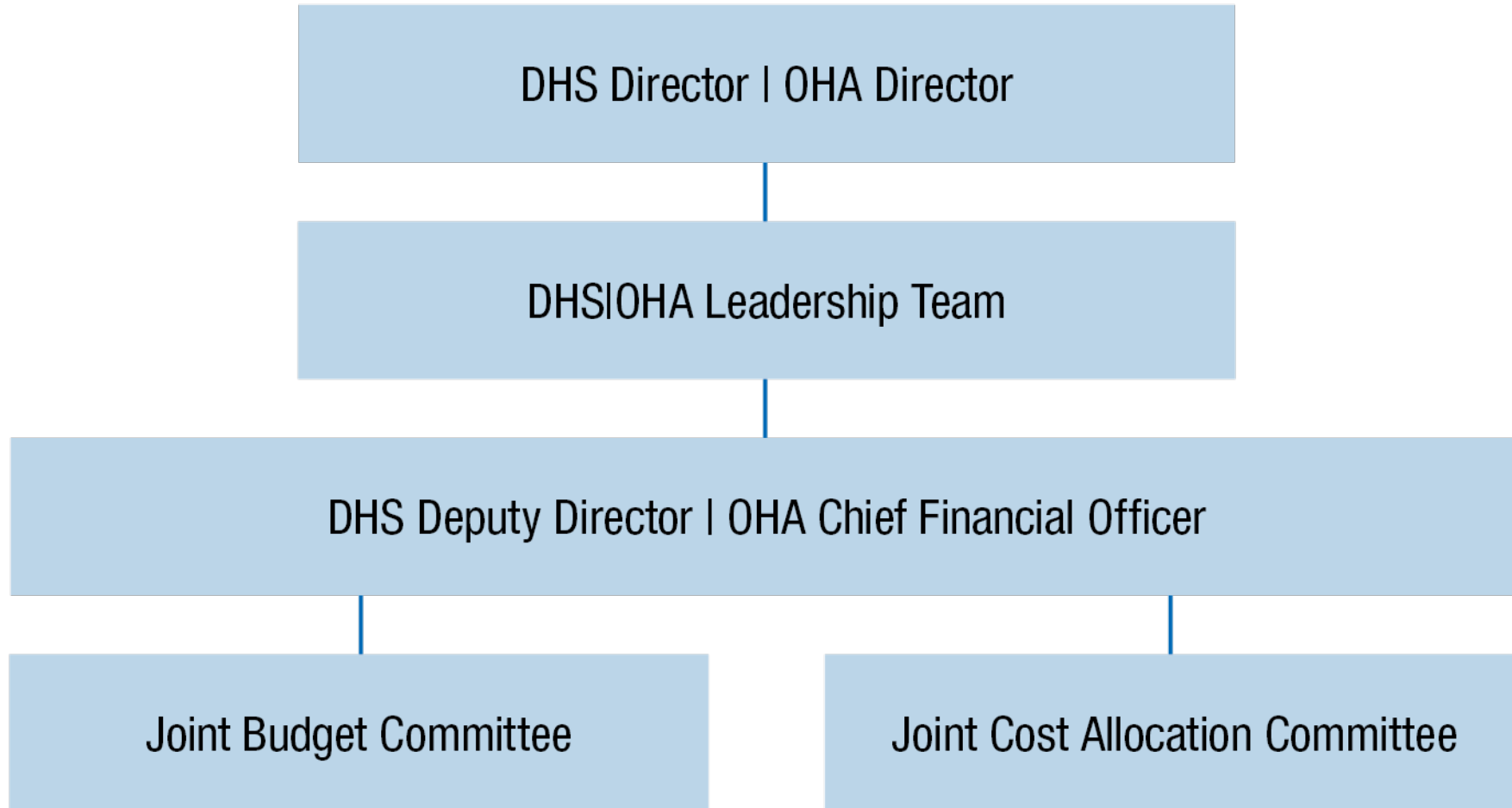
Shared Services established through two formal agreements

DHS/OHA Memorandum of Understanding

Service Level Agreements
- Written agreement between program and agencies
- Establishes a vendor-client relationship
- Defines how the services will be paid for
- Provides the process for resolving issues

Office Service Level Agreement

Office of Financial Services (OFS)

Document History Log

Rev.	Date	Author/Phone	Description
Original 1.0	5/12/2011	Shawn Jacobsen (503) 945-6869	Service Level Agreement in new format
Update 1.1	03/08/2012	Shawn Jacobsen	Update Budget, Strategic Plan, Contacts
Update 1.2	09/10/2012	Shawn Jacobsen	Update 2011-13 Budget
Update 1.3	08/21/2013	Shawn Jacobsen	Update 2013-15 Budget and Performance Measures
Update 1.4	03/27/2015	Shawn Jacobsen	Organizational updates
Update 1.5	10/10/2016	Shawn Jacobsen	Update 2015-2017 Budget and Contact Names

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DHS Shared Services

DHS in your community

Self-Sufficiency Programs

Vocational Rehabilitation

Child Welfare

Intellectual/ Developmental Disabilities

Aging and People with Disabilities

Central Services

| Adult Abuse Investigations | Contracts and Procurement | Facilities | Financial Services | Forecasting |
| Human Resources | Imaging and Records | Internal Audits | Payment Accuracy and Recovery | Publications and Creative Services |

Welcome

Safe, Healthy, Independent Oregonians

EVERY YEAR SERVING 1.2 MILLION OREGONIANS

DHS Shared Services Mission

Provide critical business services that are data-informed, accountable and transparent

Operating principles

- Customer-centered
- Continuously improving and innovating
- Developing and sustaining strong business partners
- Intentionally inclusive

Examples of our work

Issuing an average of **244,266** payments a month to providers, contractors and vendors

Conducting **19,141** investigations of abuse of adults or children in residential settings or I/DD services in 2015

Writing more than **2,000** contracts, agreements and grants a year

Generating **20** program caseload forecasts that draw **600,000** website hits annually

Facilitating **38** state and federal audits and reviews this biennium

Delivering nearly **900** in-person or online trainings to staff and partners this biennium

Managing more than **3 million** square feet in 180 facilities statewide

Handling more than **3,000** requests a year for form and publication design, printing and translations

Scanning **3 million** pages of client records a month

Completing **147,119** background checks in 2016

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Oregon Health Authority

Achievements: Customer-centered

- Created new contracting tool to expedite process for low dollar, low risk contracts

- Expanded e-commerce options to accept online credit card payments and expanded direct deposit payments to contractors and providers

- Improved timeline for Oregon Health Plan eligibility determination by shifting requests for information from OHA eligibility staff to the Imaging and Records Management (IRMS) team

- Revised facilities planning process to ensure and increase stakeholder input

- Combined occupational health, safety and emergency services into one program to improve our preparedness and responsiveness to emergency and business continuity issues

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Achievements: Continuously improving and innovating

- Increased recoveries by $1.2 million through Overpayment Recovery Unit process improvements

- Increased cost avoidance by $15 million through Data Match Unit process improvements

- Earned Gold Star Awards for timely and accurate financial reporting for both DHS and OHA

- Implemented new Learning Management System 40 percent under budget and successfully moved 1.2 million training records to an upgraded system

- Re-examined contracting standards and reduced a 50-step process to 22 steps

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Achievements: Developing, sustaining strong business partners

- Brought together 165 abuse investigators from across Oregon to network, participate on panels, and receive training on abuse investigation topics

- Reduced administrative burdens on Behavioral Rehabilitation Service providers (BRS)

- Initiated formation of the statewide Financial Leadership Council, a state finance manager consortium, focused on financial best practices and recruitment, retention, training and development of accountants in state government

- Participated in statewide information technology initiatives as steering committee members for the Human Resource Information System and OregonBuys e-procurement solution

Achievements: Intentionally inclusive

- Increased the accessibility, service quality, coordination, tracking and delivery of urgent translation requests for case workers relating to child transportation and court requested documentation requests

- Partnered with Employment First to create and implement statewide outreach campaign to support the benefits of paid, integrated work in community jobs for people with intellectual and developmental disabilities

- Launched initiative to create principles-based standards for new buildings to improve accessibility and environment for clients and staff
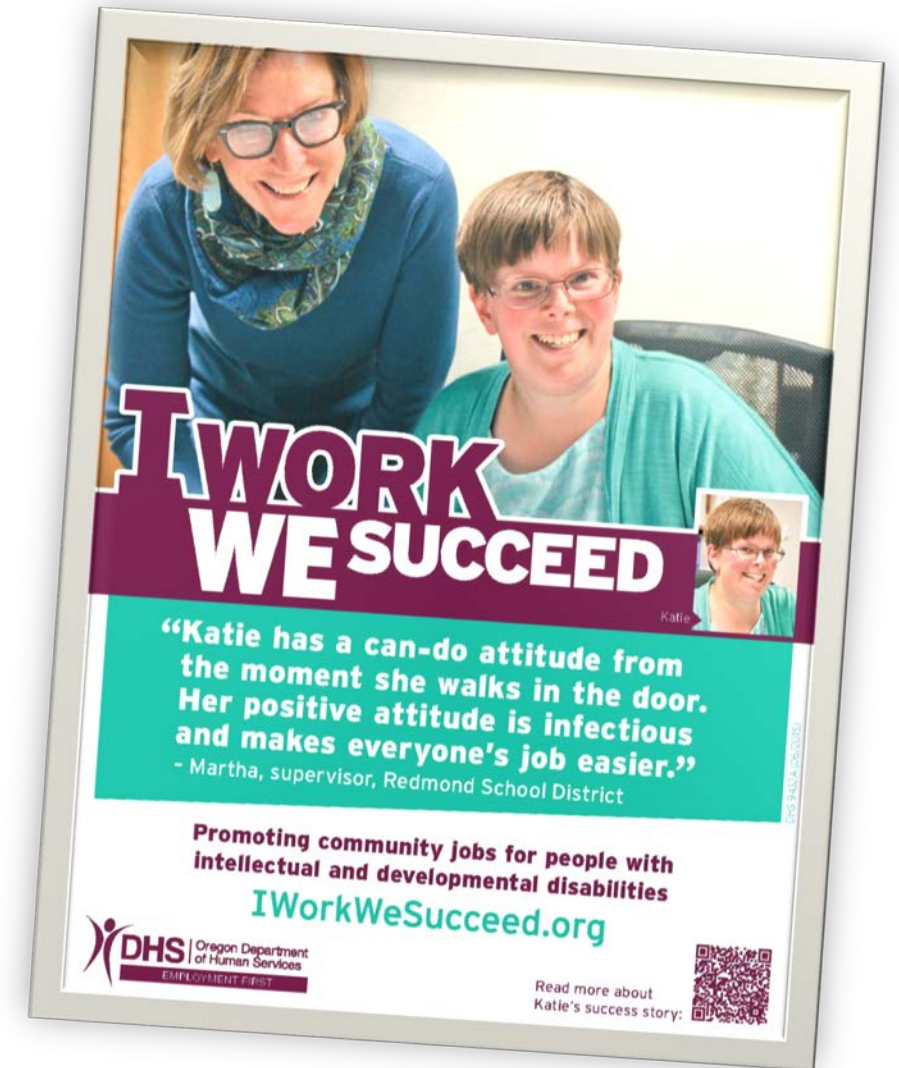
Safety improvements

- Lead, collaborated with other DHS programs to implement SB1515, and to train and support CCA staff on the changes

- Sped up investigations timelines for adult and Child Caring Agency (CCA) abuse investigations; reduced backlog

- Conducted three internal safety audits to improve agency support of CCAs

- Updated plans and procedures for emergency response and business continuity, including creation of a Business Continuity Coordination Group

Figure 1. Monthly Screening Outcomes

Legend: Reports Received, Assigned for Investigation, Closed at Screening

Our primary challenge

LIMITED RESOURCES

INCREASING DEMAND
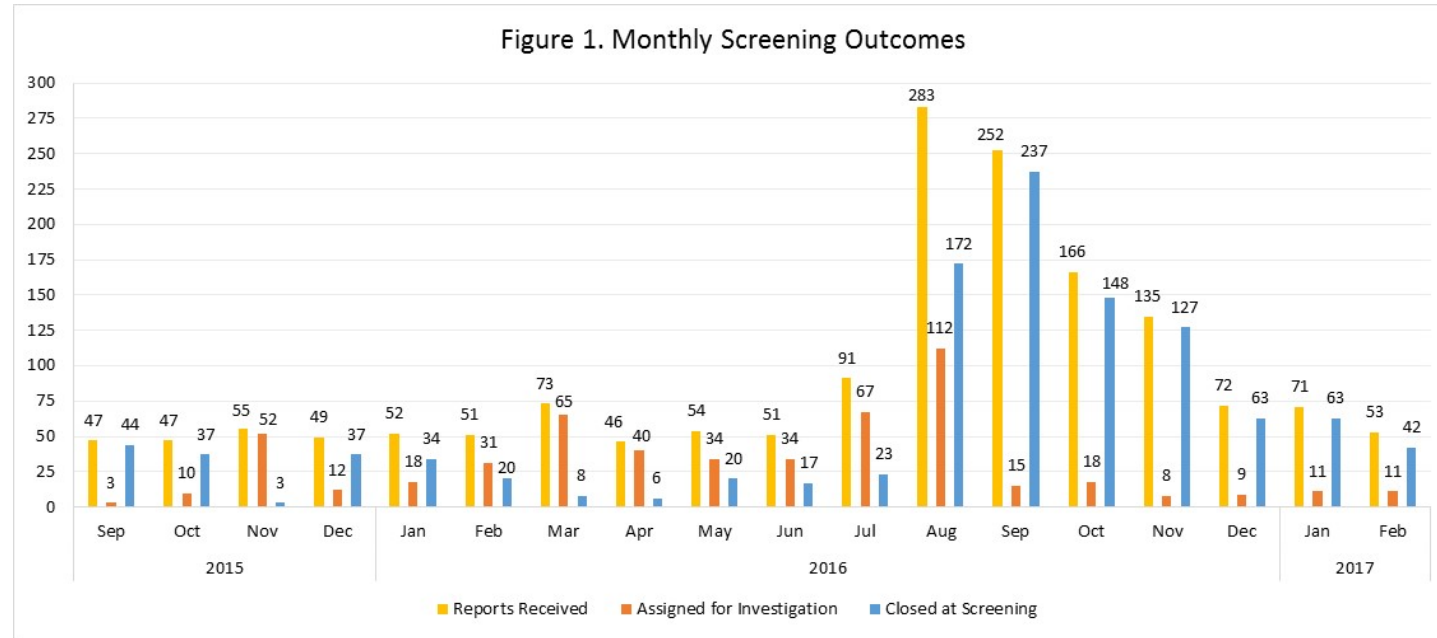
Investments

Background Check Unit Workload and Expansion

Policy Option Package 205
($6.1M General Funds, $7.3 Total Funds)

- 64% increase in fingerprinting due to new federal requirements

- Despite process improvements that reduced workload by 17%, increasing demand is causing mounting backlogs and longer processing times

- Requesting positions to pace with demand; reduce safety risk to clients
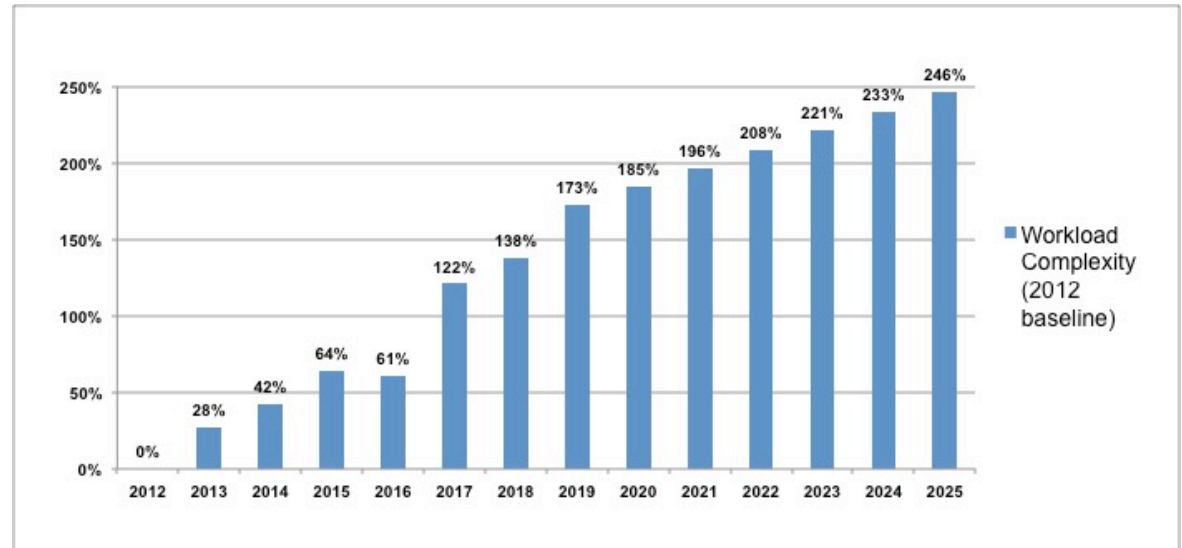
Investments

Integrated Eligibility Project

Policy Option Package 201

(Repricing in progress)

The Integrated Eligibility Project will enhance Oregonians' experience with current eligibility determination processes by integrating state benefit programs into a single IT system.

The project is being repriced based on a revised schedule and scope. Estimated completion for final pricing is April 20, prior to the JLCIMT meeting on the project.
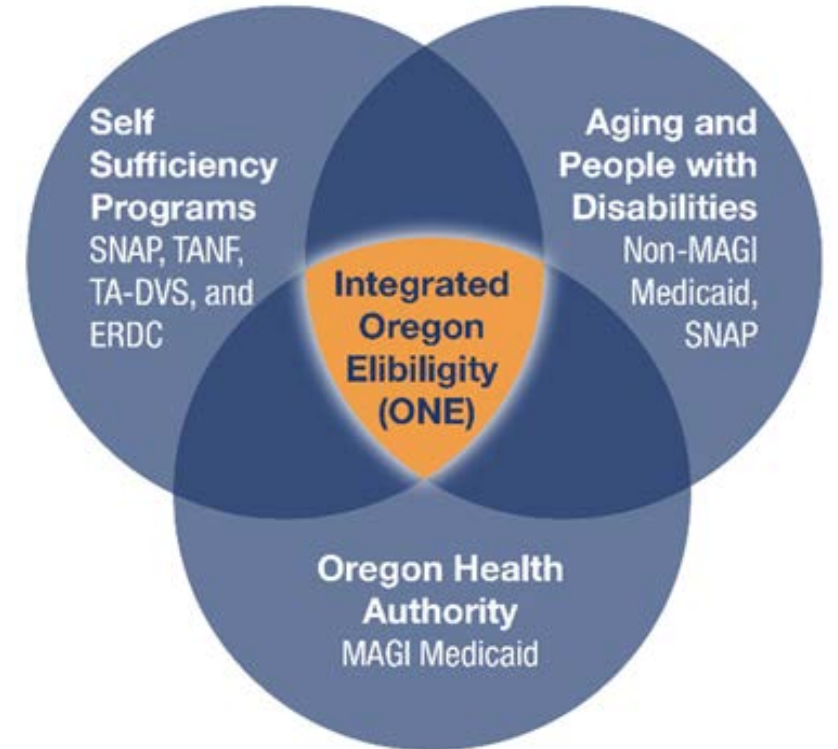
Department of Human Services
2017-19 Governor's Budget
Total Fund by Program Area
$11.26 Billion

Aging and People with Disabilities
$3.42 Billion
30%

VR Basic Rehabilitative Services
$114.0
1%

Intellectual & Developmental Disabilities
$2.71 Billion
24%

Child Welfare
$1.05 Billion
10%

Self Sufficiency
$3.18 Billion
28%

Central & Shared Services, State Assessments & Enterprise-wide Costs and Program Design Services
$793.8
7%
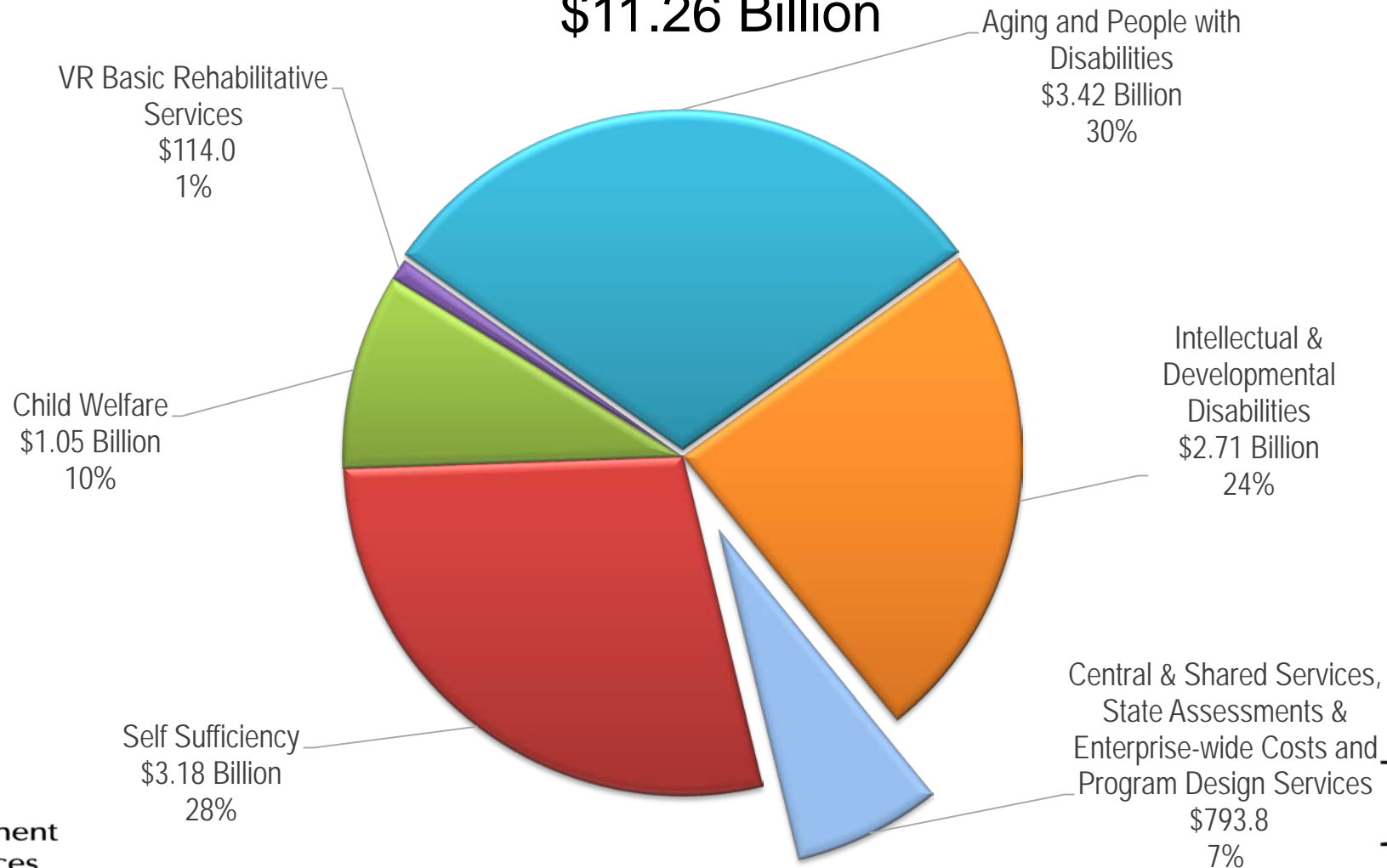
DHS Shared Service Offices' OF Limitation, $132.3 million

- Shared Services Administration, 1.3, 1%
- Budget Center, 3.8, 3%
- Publication and Design Section, 2.7, 2%
- Office of Forecasting & Research Analysis, 4.0, 3%
- Office of Pmt Accuracy & Recovery, 28.4, 22%
- Office of Financial Services, 28.0, 21%
- Internal Audit and Consulting, 2.1, 2%
- Office of Adult Abuse Prevention and Inves, 11.0, 8%
- Human Resources Center, 24.0, 18%
- Office of Contracts & Procurement, 9.6, 7%
- Imaging & Records Management Svcs, 12.2, 9%
- Facilities Center, 5.2, 4%

Anticipated Shared Services Expenditures Equal the Anticipated Revenues

2017-19 Governor's Budget Shared Services Limitation (Resources) by Agency $295.4 million

DHS Shared Services, $132.3, 45%

OHA Shared Services, $163.1, 55%
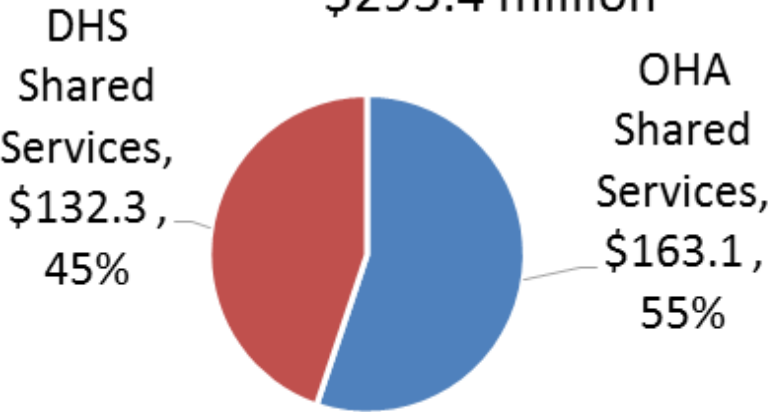
2017-19 Governor's Budget Shared Services Funding (Revenue) by Agency $295.4 million

OHA Shared Services Funding, $97.3, 33%

OHA Projects / Other, $1.9, 1%

DHS Projects / Other, $10.6, 3%

DHS Shared Services Funding, $185.6, 63%
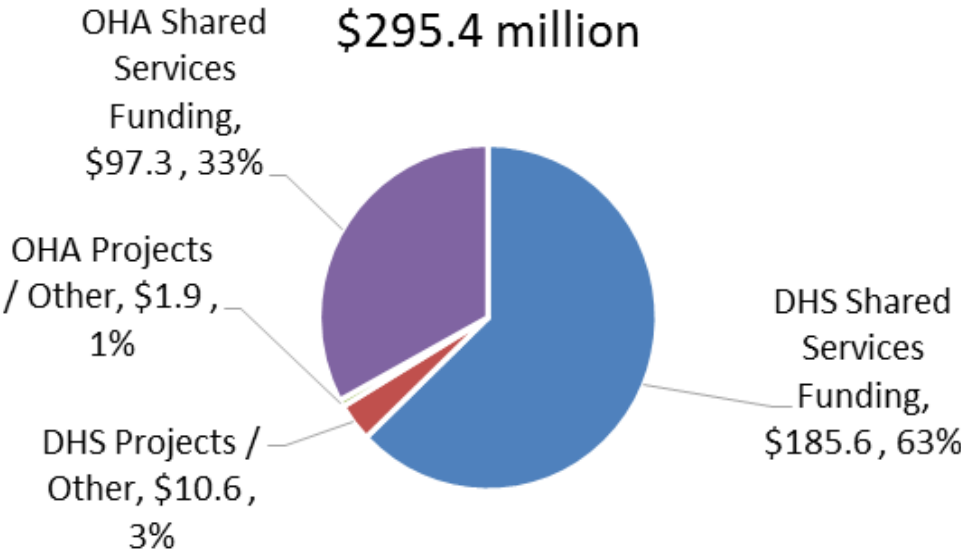
OHA Shared Services

OHA Shared Services – What we do

Office of Information Services (OIS)

- Supports technology needs for all DHS and OHA programs
  - 12,000+ agency staff plus partners such as, Area Agencies on Aging (AAA) offices and County Developmental Disability Program (CDDP)
  - 250+ applications related to eligibility, enrollment, benefit issuance, licensing, protective services, public health, case management, hospital management, provider payments and many more health and human services needs
 - 300+ technology tools and support applications such as the Service Desk ticket tracking tool, and the tools used for remote access to our systems
  - 23,000+ technology devices (desktops, laptops, tablets, cell phones, printers)

- Provides information security and privacy program management, education & awareness, risk and vulnerability management, and e-Discovery for DHS and OHA

2017-19 OHA Shared Services Organizational Chart
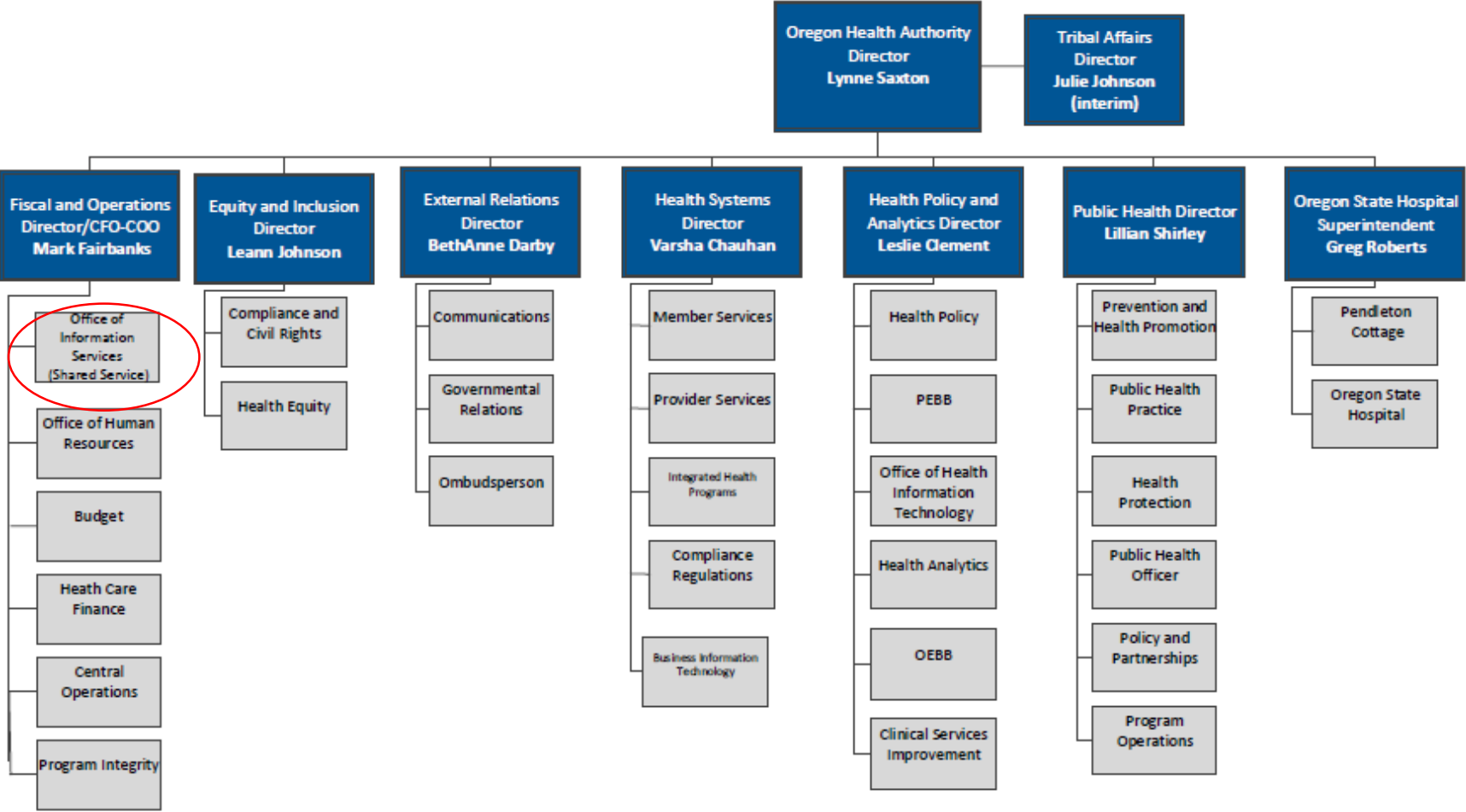
Office of Information Services Accomplishments

- ❑ Implemented **a Performance Management System** to define the work of OIS

- ❑ Adopted a **Scorecard** to set improvement targets and measure progress

- ❑ Implemented a **Governance Framework** to guide prioritization and IT investment decisions

- ❑ Implemented a **standard Project Management Methodology**

- ❑ Created an **Audit and Risk Management program** focused on resolving audit findings

- ❑ Implemented **new training modules for Security and Privacy** education and awareness

2015-2017 Outcomes:

- ✓ **Average resolution time** for Service Desk tickets **dropped from 7 days to 2.8 days**

- ✓ Service Desk **tickets resolved on first contact have increased from 42% to 64%**

- ✓ Successfully **completed 14 major projects (>$1 Million)**

- ✓ **Critical applications** have maintained **uptime of 99.9% for over 12 months**

- ✓ **Resolved over 276 open audit findings** in 2016

- ✓ Completion of **Security & Privacy Awareness training reached 97%** across both agencies in 2016. Up from 92% in 2014

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Highlights of 2015 - 2017 Completed Projects

14 Major projects Completed = $125M

1. Medical Marijuana Expansion

Created new, legislatively mandated functionality for intake, storage, tracking, auditing and reporting of medical marijuana growers, producers and patients

✓ Improved business functionality
✓ Legislative Mandate
✓ Delivered on time, within very tight timelines

2. Women Infant and Children (WIC) Electronic Benefit Transfer (EBT)

Replaced WIC paper vouchers with Electronic Benefit Transfer system for the distribution of WIC food benefits

✓ Improved business functionality/ productivity

3. Behavioral Health Integration - Medication Management / D/R

Completed implementation of Oregon State Hospital electronic health record system. Final components included a medication management system and high availability disaster recovery capabilities

✓ Improved business functionality/ productivity
✓ Disaster recovery

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Oregon's Medicaid Management Information System (MMIS)
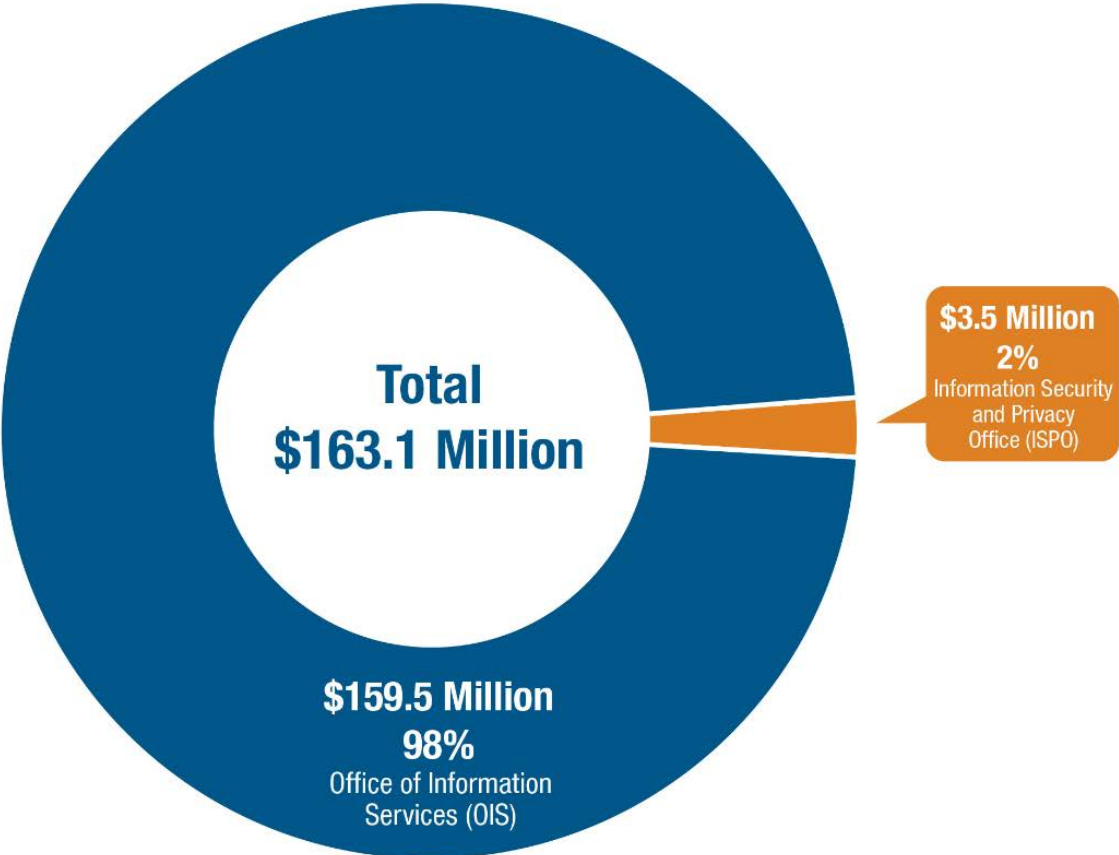# Oregon's MAGI Medicaid Eligibility System (ONE)

The Oregon MMIS pays health care providers for services they render to individuals who qualify for Medicaid. Eligibility source systems send Medicaid eligibility information to MMIS which assigns a benefit plan, enrolls clients in Coordinated Care Organizations (CCOs), and makes payments to CCOs and providers

- During 2016, MMIS processed over $6.7 billion in payments, including $4.9 billion to CCO's as capitated payments.

The MAGI Medicaid eligibility determination system (Oregon Eligibility, or ONE) Worker Portal went live December 15, 2015, as planned ($56.7M).

- ONE Applicant portal was launched in April 2016 to community assisters, and to all citizens in October 2016.
- ONE included only base functionality.   A project was launched immediately after implementation to add additional functionality and reduce manual work arounds.

OHA Shared Services Budget 2017-19 by Program

Total
$163.1 Million

$3.5 Million
2%
Information Security
and Privacy
Office (ISPO)

$159.5 Million
98%
Office of Information
Services (OIS)

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2017-19 Policy Option Packages

1. DHS Centralized Abuse Management (CAM) (POP 102)

Implementation of an integrated solution for tracking, reporting and supporting investigations of adult abuse ($1.9M General Fund; $4.3M Total Funds)

2. DHS/OHA Integrated Medicaid Eligibility (Integrated ONE) (POP 201)

Continuation of the Integrated / Medicaid Eligibility Project to include eligibility determination for Non-MAGI Medicaid, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF) and Employment Related Day Care (ERDC) into ONE (Repricing in progress)

3. Enhancement and Support Services for ONE (POP 406)

Funds enhancements to Oregon's Modified Adjusted Gross Income (MAGI) Medicaid eligibility determination system (ONE) ($1.3M General Fund; $12.8M Total Funds)

4. MMIS Modularization (POP 405)

Supports the planning work needed to define Oregon's Medicaid service delivery plan and identify options for modular solutions for Medicaid systems ($0.4M General Fund; $5.6M Total Funds)

Summary

- Shared Services are foundational, essential contributors to DHS and OHA achieving their visions for Oregonians

- Our mission is to provide services that are data-informed, accountable and transparent

- Demand for our services is outpacing our resources, straining the foundation of our agencies