AGD - Streamlining AFC/GAFC Determinations

Pilot Kick-Off & Provider Training

June 17, 2014

Executive Office of Elder Affairs

Agenda

- Greetings & Introductions

- About AGD

- Current/ Future Process

- AGD is part of SIMS

- SAMS 101

- Process Overview

- Process Demo

- Pilot Timeline & Upcoming

- Expectations & Point-person Role

- Communications & Support

- Q&A

Pilot Participants & Project Team

Pilot Organizations
HEARTH, Inc.
Peabody Resident Services
Greater Lynn Senior Services
Longevity Care
Caregiver Homes
Greater Springfield Senior Services
All Care Home Care GAFC
Beacon AFC

EOEA / OLTSS		
Jim Ospenson	SIMS Business Analyst	Project Manager
Andy Grigorov	SIMS Business Analyst	Project Manager
Pam Gardner	GAFC Program Manager	Project Manager
Mary Ellen Coyne	Assistant Clinical Manager	
Allison Ananis	AFC Program Coordinator	
Danielle McKnight	ADH/Day Hab Program Manager	

About AGD Streamline

"AGD"?

- Stands for **A**FC & **G**AFC **D**eterminations
- Renamed so that AFC is not buried

Project Objective:

- Reduce time-to-determine for all providers
  - Last year's survey showed 20 + days from submission to notification (averaged across all providers)
- Project goal: 5 days

AGD is funded by **CMMI State Innovation Model Grant**

- Model Testing Award to Massachusetts EHS in Feb 2013

- Other agencies: MassHealth, DPH, DMH, CHIA, GIC, Elder Affairs

- AGD is 1 of 4 ELD projects

- For more info

  - http://innovation.cms.gov/initiatives/state-innovations

  - http://www.mass.gov/eohhs/gov/commissions-and-initiatives/state-innovation-model-grant.html

Current-state: 2-tiered system for AFC & GAFC Determinations

Provider orgs: new to SIMS (not ASAPs)

- Record clinical information on paper
  - Using 7 page MDS-HC "checkerboard" form

- Mail application materials to Coastline
  - MDS-HC (checkerboard)
  - Request for Services
  - Physician Summary Form
  - *AFC Cover Letter*

- Q&A via phone, replacement materials by snail-mail

- Notification by snail-mail

Provider orgs: existing SIMS users (ASAPs)

- ASAP locates existing (or creates new) SIMS consumer record

- Clinical data:
  - applicant's MDS-HC data is loaded into a SIMS CDS-2-RN assessment

- Mail additional materials:
  - Request for Services, Physician Summary Form, AFC Cover Letter

- Q&A within SAMS using Activity/Referral. Updates to MDS-HC, if necessary, within SIMS.

- Coastline pulls CDS-2 data into a new CDS-2-RN, adds determination info

- Notification by snail-mail

Future-state: AGD process is fully in SIMS... What's New?

Provider orgs: new to SIMS (not ASAPs)

- No more snail-mail
  - Consumer's notification excepted

- Login to secure portal

- MDS-HC data entered to SIMS
  - All data is consistent, only Assessment Narrative is new

- Submit digital document scans (RFS, PSF, etc.)

- Activity/Referral notifies Coastline of new application

- Review determination details in CDS-2-RN (SIMS Assessment)

- A completed determination may be viewed the same day notifications are mailed.

Provider orgs: existing SIMS users (ASAPs)

- No more snail-mail
  - Consumer's notification excepted

- File Attachments for scanned documents (RFS, PSF, etc.)

- Use SIMS MDS-HC instead of CDS-2

- No default agency-switching

- CESI creates Service Order

- Workflows guide data entry

The bottom-line:
Not too different!
Everyone will see faster turn-around

What is SIMS?

- SIMS = **Senior Information Management System**

- ELD's system-of-record for the home care program (state & waiver), Title III/NAPIS programs, LTC Ombudsman, and Adult Protective Services program

- A centralized database & suite of applications with deep business functionality, linking ELD to its operating partners.

    – Most SIMS applications are a **SaaS** ("Software as a Service") solution operated by **Harmony Information Systems** (www.Harmonyis.com)

    – Most users work in Harmony's SAMS application

    – **SIMS** & **SAMS** often used interchangeably.

Information & Referral
Eligibility
Intake & Waitlist
Case Management
Care Planning & Service Planning
Service Authorization & Delivery
Reimbursement, Billing & Budgeting
Provider Management
Federal Claiming (CMS)
Elder Protective Services
Reporting
Information Exchange

Fortunately we won't need to discuss the **SIM-grant** very often.

Sizing SIMS:

Consumers	Total
Registered consumers, who have received at least one service since 2004	**595 K**

Consumers & others	Total
Total individuals in SIMS, since 2004	**785 K**

Including registered consumers, caregivers, and unenrolled I&R callers.

Assessments	Total
Several instruments are used, including the Comprehensive Data Set (CDS) used by Case Managers and RNs for eligibility determination & case management; other assessments include I&R/intake; Nutrition, MFP, and more.	**1.8 M**

The CDS is an extension of InterRai's MDS-HC: the Minimal Data Set for Home Care. Consumers enrolled in EOEA Home Care programs are assessed every 6 months, with a CDS.

Lots of Data

Lots of Users

End Users (Mass EOEA, ASAP, AAA)

ASAP, AAA, and EOEA staff I&R, Case Managers, RNs, Fiscal staff	3,200
Ombudsman (Long Term Care, Community, Assisted Living)	55
Elder Protective Services Field Staff	450
Total (Mass EOEA, AAA, ASAP) end users:	**3,665**

End Users (3rd parties)

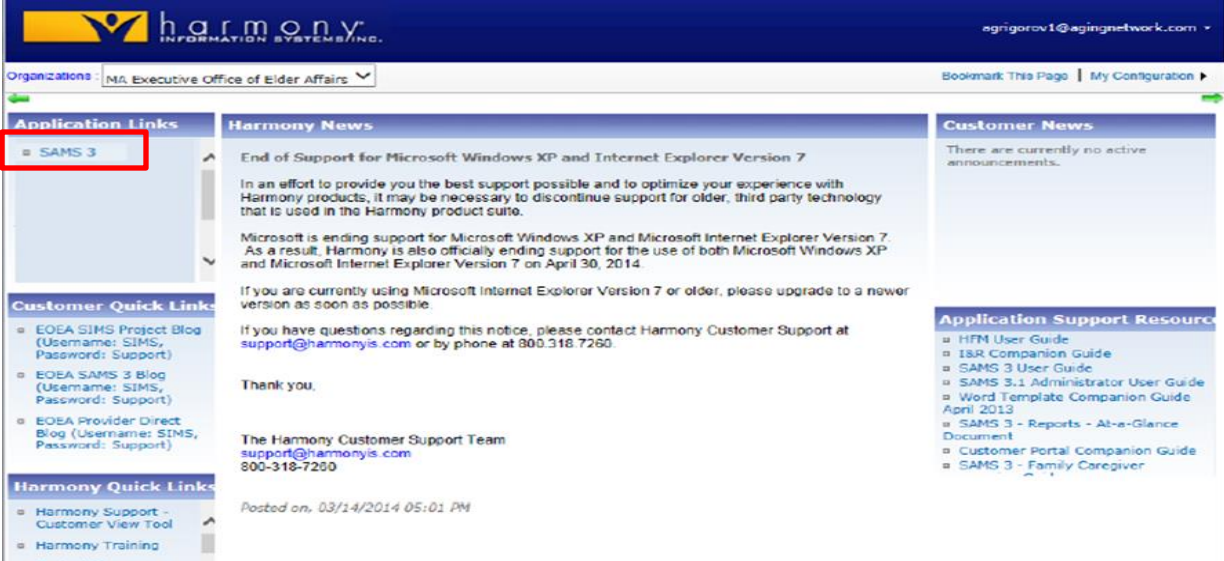|	
Direct Service Providers View service authorizations, record electronic invoices	1,300
Caregivers Community Links Portal - Caregivers (pilot)	---
Physician office staff, physicians Community Links Portal - Professionals (pilot)	---
Total (3rd party) end users:	**1,235**

User Account & Portal Page

Harmony Portal: Getting your credentials and first login

– Receive username and temporary password in email

– Answer 3 security questions (in case you forget password)

Click on **SAMS 3** Link.
You may be prompted to download "Silverlight"

SAMS 101

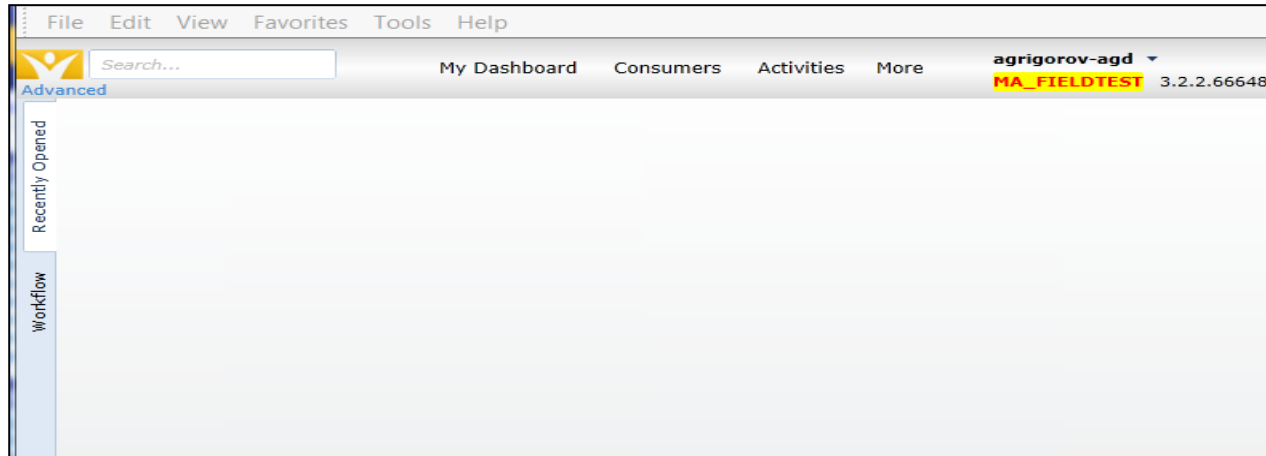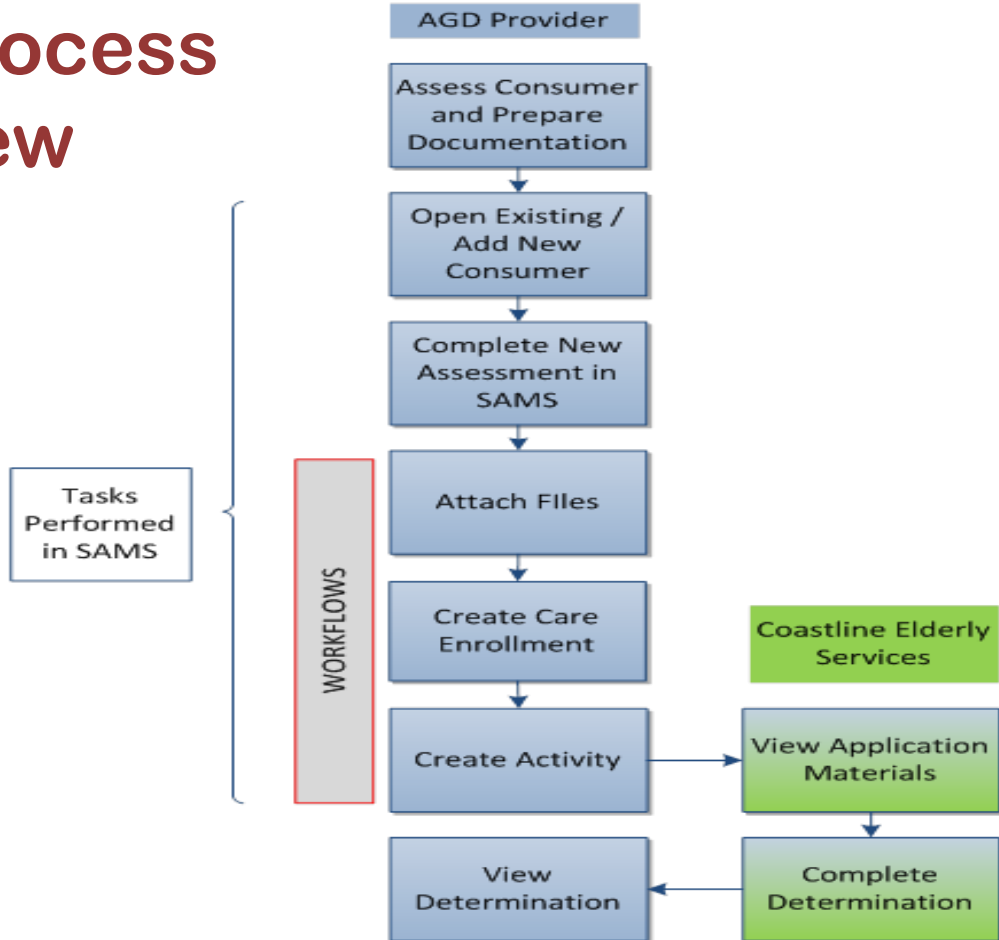| User Preferences & Navigation	
Screen layout	Navigation, searchbox
My Settings	user preferences
Dashboard	Widgets & Saved Searches
Workflow	Triggers & Tasks

Key Data Elements

- Consumer record
- Assessment data & narrative
- File Attachment
- Activity & Referral

Other Data Elements

- Enrollment
- Service Order
- Service Delivery

AGD Process Overview

Process Demonstrations (using SAMS)

- Field Test environment using fictional consumers

Pilot Timeline

	Date	Item	Note
☑	**Fri Jun-13**	User Account Info	Initial set of User Accounts
☑	**Tue Jun-17**	Pilot Kickoff	Kickoff meeting for AGD Point-people
☐	**Thu Jun-19**	Training Webinar 10am	**All end-users.** • **Intro to User Guide.** • **How-to:** 1st login, User Account setup, security questions. • **AGD Process**: locate/create consumer, assessment data entry including narrative, file attachments, workflow trigger s & tasks, monitoring in-progress determinations, post-submission of replacement or supplemental clinical documentation per CESI request, notification. **Webinar will be available as a recording.**
☐	**Thu Jun-19**	User Accounts Active	**User Account information** is emailed to each user after webinar
☐	**Thu Jun-19**	Practice Period Begins	**All end-users:** ❑ perform 1st-time User Account setup; one-time workstation setup ❑ Practice forgot/reset password (*users' actual accounts in Harmony portal*) ❑ practice workflow processing in SAMS (*field test environment*)
☐	**Tue Jun-24**	Weekly Webinar (first)	**Ongoing Support webinar for any & all users**. AGD Point-people (or an alternate) are expected to attend. Project Team will continue weekly webinars as needed. **Specific schedule TBD**.
☐	**Mon Jun-30**	Go-Live	End Practice Period. All User Accounts set to production environment. All determinations via SAMS.

AGD

Pilot first, followed by statewide deployment

Like all pilots:

- Goal: Smooth out any rough edges
  - End-to-end processing with small group before going into wide release

- Mission: Identify & correct issues
  - … of process, protocol, support, documentation, training, communication, toolset, security, etc.

- Method: Iterative
  - The 1st release is Project Team's initial best guess
  - The 2nd & subsequent release(s) need your expert end-user input

Expectations for participants:

- Expect change
  - See Mission & Method.

- Speak up!
  - … and speak clearly, to help us understand your issue.
  - Communications protocols provide structure for efficient communication
  - Pass along info, technique, and up-to-date reference material to your organization

Role of AGD Point-person

Primary point-of-contact for all AGD Project & Support communications

- Liaison between the AGD Project Team & your organization (end-users & management).

- Disseminate information to your organization's end-users. Seek clarification from the Project Team whenever necessary.

- Act as the designated voice of your organization. Communicate with AGD Project/ Support Teams via standard protocols.

- Identify two (2) point-people for continuity during vacations or at other locations. Train your alternate.

User Account access administration

- identify colleagues who should be SAMS users. Communicate required information to AGD Project/Support Team.

- Ensure that end-users can self-manage password resets using security questions/answers on file.

- Ensure that User Accounts are terminated as needed; other aspects of maintaining your organization's Administrative Security to Protected Health Information.

End-user training

- within your organization, ensure that all end-users can function accurately & efficiently, according to up-to-date business rules. Use training materials made available by the AGD Project Team.

- Raise issues and identify gaps or improvements in training or other materials. With your help, AGD documentation & materials will be effective, clear and usable.

Point-people are the first line of user support

- Help end-users resolve User Account issues; perform basic troubleshooting; and incidental training to enable successful use of SAMS.

- If a technical or administrative issue emerges, the Point-person gathers details and communicates, in place of the end-user, directly with support staff at ELD/OLTSS.

Point-person's function continues after implementation ends

- … and operations become routine. Personnel may change after use becomes familiar.

Communication & Support

Email is required
- Decentralized project team

Please do not initiate an Issue Report by voice-mail / phone.
- Send follow-up email with issue statement, expected system behavior, and/or screenshots
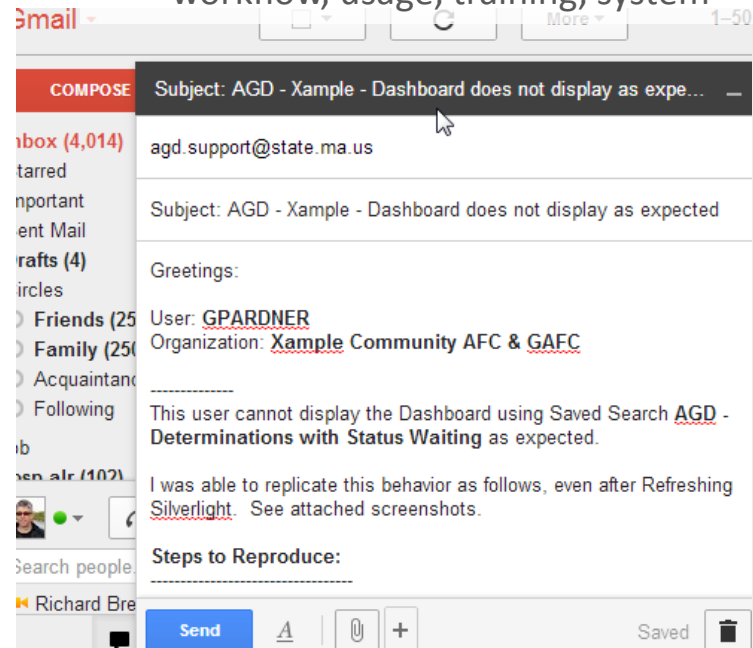
All email
- To: AGD.Support@state.ma.us
- CC: individuals if desired
- Subject: **AGD - <your_org> - 5-7 word headline**
- Specifics: username, etc.

Coastline:
- consumer-specific clinical issues

AGD Support:
- Everything else
- Application, User Accounts, configuration, workflow, usage, training, system

Gmail

COMPOSE

Subject: AGD - Xample - Dashboard does not display as expe...

agd.support@state.ma.us

Subject: AGD - Xample - Dashboard does not display as expected

Greetings:

User: GPARDNER
Organization: Xample Community AFC & GAFC

This user cannot display the Dashboard using Saved Search AGD - **Determinations with Status Waiting** as expected.

I was able to replicate this behavior as follows, even after Refreshing Silverlight. See attached screenshots.

Steps to Reproduce:
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inbox (4,014)
tarred
mportant
ent Mail
rafts (4)
ircles
Friends (25
Family (250
Acquaintanc
Following

Send   A | +

Saved

Thanks