

**ADRC Ad Hoc Peer Work Group Call on IT/MIS Issues
2/16/06**

Participants:

Ron Tanner, AL
Joseph Rembert, AL
Robin Jordan, AZ
Robyn Linen, GA
Phyllis Culp, KY
David Young, MI
Tish Kelley, MS
Robert Desruisseaux, NV
Doug Price, PA
Marcie Perkins, WI

Maurine Strickland, WI
Marcie Perkins, WI
Casey Woods, WY
Kim Schutt, WY
Lisa Alecxih, Lewin
Carrie Blakeway, Lewin
Barbara Ettner, Lewin
Christina Neill, Lewin
Madison Sloan, Lewin
Greg Case, AoA
Joseph Lugo, AoA

Marcie Perkins (WI): Marcie introduced Wisconsin's software selection criteria and described the process Wisconsin went through when selecting an IT/MIS vendor. The tool was designed to keep the state aware of how each product they looked at would fit with their particular business requirements. WI sent letters to approximately 15 vendors, asking them to review the requirements and submit a response. Eight initially responded, and the version of the tool on the ADRC website reflects the 5 vendors that were seriously interested in bidding.

Much of the work was weighting and refining their priorities – which features would be nice to have but weren't important (Not Applicable – 0) to which features were essential (Required – 3). Weighting also involved balancing between the priorities of the county and state level stakeholders, and some work to clarify what exactly a product could do, and whether it met WI's requirements as well as the vendor claimed it did.

Phyllis Culp (KY): This tool looks wonderful and should really help them. Could Wisconsin provide more information about how they figured out the difference between vendor representations and product performance? Why did they go with Beacon? Have there been any issues with using it?

Marcie Perkins (WI): They looked at the match between detailed information about what the product could do (some of which they had to collect on their own if the vendor did not provide details on the criteria tool) and their requirements. Did not do independent testing.

WI chose Beacon primarily because it was in the same suite as SAMS, the Synergy program all their aging units were using. Beacon scored well on the evaluation criteria, but was chosen to go with the system they already had.

WI had some issues with installing software – incompatibility with programs that were already on the server, servers needed to be upgraded, some problems with the software

itself. They're now looking at a web-based version that would eliminate installation problems.

Tish Kelley (MS): We also have SAMS and are looking at Synergy's Beacon web-based product. The lack of double entering would be a big plus. They just did a demo but are concerned that it takes too many steps for users to get the information out of the system, particularly if they have hourly workers without a lot of experience using it. They'd like to be able to search once you've entered the client's service interest area and location, not have to go to a separate window to search. Has WI been able to get Synergy to cut the number of steps down?

Maurine Strickland (WI): Yes, I think so, but part of the enhancement they're looking for is "hot button" searching that avoids the need to gather too much information from the client before running a search. But you have hit on another important topic: staffing. You have to make sure the staff is well trained, then the ease of use will be there.

Marcie Perkins (WI): Documented workflow is a really helpful thing to take to a vendor to figure out how the software fits and if you have to change any of your processes: a graphic that really spells out step 1, step 2 in process your workers use. Ask the vendor to explain how their software can meet your process. Look for a match between the software and your business process.

Lisa Alecxi, Lewin: Similar to what Marcie was saying about work flow, when thinking about what you want, you should come up with your requirements first - without looking at what software is available. Don't let vendor capability drive your requirements. Minnesota had a bad experience doing this – they bought what they thought was great software but it didn't work with their process and they had to start over – a waste of time and money.

Christina Neill, Lewin: What systems are grantees using and where are they in the process?

Georgia: Using ESP, was already in place in the Aging agencies and adapted it for developmental disabilities

Alabama: Using Elder Connect which was written in-house and was already in place. Includes I&R and client tracking and is web-based. They are going to have to add mental disabilities. It can be accessed at <http://www.ageline.net/> Click on Elder Connect.

Wisconsin: Synergy SAMS and Beacon.

Pennsylvania: They are at the user acceptance testing stage with state call center software that they have modified.

Kentucky: They just purchases SAMS and are looking at Beacon. They thought they doing one pilot, but will need to revisit IT/MIS plans because the State Medicaid agency now wants the ADRC to be the gateway for what they are calling their 1115 super-waiver. They are meeting with the governor's office next week.

Arizona: SUA is looking at programs that would work for ADRC and all aging programs. They are seeing demos right now.

Nevada: Looking at Synergy's Beacon and will benefit from WI's planning and work.

Wyoming: Developing a system in-house. They have a web-based database (WY Connect) and he thinks they have SAMS. They are hoping to build a special entry portal tailored for ADRCs.

Michigan: Have ServicePoint, which is web-based and includes call center software, a resource directory, and a community web-browser. ServicePoint was chosen because the state is already using it as part of its federal homelessness programs, all the housing resources were already in it and MDCH is adding health related resources.

Maurine Strickland (WI): They're working with the AIRS Infoline taxonomy, has anyone else customized the taxonomy and used it for keyword searching?

Casey Woods (WY): WY used the taxonomy to categorize their database and it's working pretty well. They use the 5th level of the taxonomy when they need to, but rarely get out to the 5th level. They were using IRIS but abandoned that because it wasn't specialized enough, now they use SQL database. They don't use all the codes, just enter them into the taxonomy as needed.

Greg Case (AoA): Has she seen the discussion on the bulletin board about this issue? (Briefly summarized thrust of that discussion) Has WI customized the taxonomy?

Maurine Strickland (WI): They're working on customizing now. They met with folks from 2-1-1 who know the taxonomy really well helped them compile a list of key words for searching. They've picked around 1000 or them and are linking them now so they will have at least two codes connected with key word list. They have gone to the 5th level where they needed to. They want to use the AIRS taxonomy because of concerns about sharing information across boundaries in the future.

Greg Case (AoA): Some grantees have constructed a version of the taxonomy to use more specifically for ADRCs. It may be possible for AIRS to add an ADRC section to the taxonomy so all grantees can use it. AoA will look into this and let grantees know.

Casey Woods (WY): Georgia Sails at AIRS has been really open to adding new terms when the taxonomy wasn't detailed enough in a certain area. You can just email her and she'll create a new term. They are firm believers in AIRS.

Phyllis Culp (KY): She's looking at the updated list of vendors. When a state chooses a single system, are ADRCs adapting it at the pilot level?

Lewin: Yes, in many cases they are.

TA Requests:

Wyoming is interested in seeing workflow and call flow plans, and in what kinds of questions Alabama asks on their public search database.

ADRC Technical Assistance Exchange

Michigan would also like to see workflow, as well as specialized questionnaires, drop down lists, and other tools to customize sites.