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## ERMA Overview

With 13% of the state’s budget, the Office of Medicaid Policy and Planning (OMPP) within the Family and Social Service Administration (FSSA) compassionately serves Hoosiers of all ages and connects them with social services, health care and their communities. Medicaid provides a vital safety net to one in five Hoosiers. To enable State employees to be able to better serve our members, we embarked on an *Enterprise Relationship Management and Administration (ERMA)* solution leveraging the Salesforce platform to address:

- Securing PII/PHI (Personally Identifiable Information / Protected Health Information)
- Dynamic Leadership, Employee Dashboards
- Data analytics and trending
- Streamline and automate internal workflows and controls
- Automation and optimization
- Establish and maintain a single-source knowledgebase
- Utilize a purpose-built enterprise solution as opposed to email, spreadsheets, and Access databases.

ERMA includes multiple programs, involving 147 cross functional stakeholders within HoosierRx, Estate Recovery, Policy Consideration, Waiver Amendment, Rule Promulgation, State Plan Amendment, Quality & Outcomes, Publications, Provider Maintenance and the Project Management Office.

Salesforce empowers users to be more productive. It brings continuity, ensuring users follow a repeatable process. It is a single repository from which users can collaborate, eliminating the need for non-system communications and reports. Other benefits include advancing the state’s Medicaid Information

Technology Architecture (MITA) maturity score with the Centers for Medicare and Medicaid Services (CMS), FedRamp certified and 508 compliance.

## OMPP Impact

### Key Focuses

ERMA addresses 5 main areas of concern:

1. Loss of Knowledge/Information
  - a. Information buried in emails
  - b. Employee turnover
  - c. Tribal Knowledge: siloed information among areas of expertise
  - d. Disparate and inconsistent information (in emails, individual knowledge, individually managed files)
2. Lack of Transparency:
  - a. Lack of visibility into status, ageing, workflows, related documents, individual employee workload
  - b. No ability to track or trend data
3. Security
  - a. Unsecured Access databases and Excel documents with PII/PHI
  - b. Data and document retention
4. Productivity:
  - a. Loss of time researching emails for pertinent data
  - b. Manual error-prone laborious processes
  - c. No workload management
  - d. No process documentation or consistency
  - e. No onboarding training of new employees
  - f. Lack of Accessibility: 508 compliance
  - g. Lack of Collaboration
5. Real-time access
  - a. Offers a cloud-based solution to allow SME's to always be able to access the systems and information to do their jobs – whether that's at the Government Center or Remotely.

Additionally, Single Sign-on was implemented in May 2020 to allow users Salesforce access via their traditional IOT network credentials.

### Governor's 2020 Next Level Agenda

The Governor's 2020 Next Level Agenda challenges the State to cultivate a strong and diverse economy. To continue strengthening the State economy, Governor Holcomb's 2020 agenda focuses on, "transforming how we tell Indiana's story by elevating Indiana's profile within and outside the state ... with the goal of attracting more jobs, more talent ..." As we develop a 21st century skilled and prepared workforce, we should look to leverage tools and solutions that get us closer to this end, as Governor Holcomb states, "These aren't just lofty goals – they are obtainable solutions..."

ERMA helps meet this challenge by helping modernize the tools and processes of essential OMPP job functions.

<https://www.in.gov/gov/files/2020AgendaReleaseFINAL.pdf>

## Recognition Received

In addition to day-to-day efficiency increases, ERMA has received recognition for the modernization, processes and sustainability offerings that have been realized throughout this project. Rewards to-date have included the following:

### Best of Indiana 2019

The Best of Indiana Awards program was established to recognize Indiana state and local government and education organizations for their dedication, hard work and contributions in information technology. ERMA was selected based on its 1) Productivity and Performance, 2) Innovation, 3) Functionality, and 4) Collaboration.

### NAMD (National Association of Medicaid Directors) Spotlight Award

This award is to recognize innovative state Medicaid programs and initiatives that other states could benefit from learning about and possibly implement. ERMA was recognized based on efforts to address 1) Loss of knowledge/information, 2) Lack of transparency, 3) Previous security concerns of protected information and 4) Productivity enhancements.

## ERMA Phase 1

One Access database, two .NET systems, 23 spreadsheets and countless manual reports and emails were replaced with one enterprise platform. Moving to a cloud-based solution has improved reliability with 99.9% system uptime and regular patch releases. Furthermore, the platform secured the PHI/PII data for nearly 250,000 records. This number continues to grow daily.

With less than 1% of custom code, FSSA configured seven modules to meet the agency's business needs. Configuration within Salesforce enables legacy system retirement and empowers FSSA to administer services more effectively. Salesforce maintains a multi-tenant architecture that scales securely, reliably and cost-effectively. Cloud solutions provide a single platform that is all centrally managed and includes three major upgrades per year.

As part of the innovative use of technology and to accelerate development and increase ease of maintenance, the project leveraged several existing, click-to-install applications, including: Nintex DocGen for generating formatted documents and Ownbackup to ensure continuity and disaster recovery/auditing capabilities. Additionally, Salesforce tools were used to natively integrate with Outlook so users can track and relate email communication and calendar appointment records. As processes mature, the platform is easily expanded to additional audiences to be even more collaborative.

## ERMA Phase 2

### Quality & Outcomes

Prior to ERMA the Quality & Outcomes team coordinated Managed Care Entity (MCE) relationships via email and spreadsheets. Thanks to ERMA the team now utilizes the following to manager MCE relationships:

- An online secure portal that allows MCE's to upload requests for Document Reviews and to be able to quickly communicate with the State regarding these Reviews and various On-Site Meetings.
- The State handles internal tracking and coordination of all Q&O activities within Salesforce vs. spreadsheets.
- Dashboard reporting is available for trending – e.g.) State workload, MCE statistics, Inquiry results

### Publications and Modules

Currently the team is streamlining the Publications and Module process to allow the following:

- Tracking Publication changes via Salesforce workflows and automation (vs. emails).
- Providing higher visibility to deadlines and the associated statuses.
- Enabling SME's to easily contribute to the process within Salesforce.
- Focusing on versioning to ensure each person is reviewing/contributing to the correct Publications/Module version.

### Provider Disenrollment

Currently these processes rely heavily on email communications. Salesforce will bring visibility and easier coordination among 1) the mechanism triggering the disenrollment, 2) OGC, 3) DXC, 4) MCE, 5) the Indiana Professional Licensing Agency and 6) the State personnel coordinating these efforts. Interfacing with Core is a key component of this initiative.

### Provider Appeals

ERMA is scheduled to track the communications and workflow processes for provider appeals. This includes standardizing communications, tracking activities, and creating various reporting dashboards.