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CASE STUDY

EIMAGINE AND FSSA COLLABORATED TO CONFIGURE SALESFORCE TO SUPPORT PROCESSES AND PROGRAMS MANAGED BY FSSA'S OMPP

ABOUT THE CUSTOMER

The FSSA Office of Medicaid Policy and Planning administers Medicaid programs for the State of Indiana. Medicaid is more than just health coverage—it provides a vital safety net to one in five Hoosiers. The processes and policies managed and developed by this office support a suite of programs, called the Indiana Health Coverage Programs, These include traditional Medicaid, risk-based managed care and a variety of waiver services tailored to the needs of specific populations.

THE CHALLENGE:

With ERMA, FSSA-OMPP addressed four main areas of concern:

1. **Loss of Knowledge/Information**
   - Information buried in emails
   - Employee turnover
   - Tribal Knowledge: siloed information among areas of expertise
   - Disparate and inconsistent information (in emails, individual knowledge, individually managed files)

2. **Lack of Transparency:**
   - Lack of visibility into status, ageing, workflows, related documents, individual employee workload
   - No ability to track or trend data

3. **Security**
   - Unsecured Access databases and Excel documents with PII/PHI
   - Data and document retention

4. **Productivity**
   - Loss of time researching emails for pertinent data
   - Manual error-prone laborious processes
   - No workload management
   - No process documentation or consistency
   - No onboarding training of new employees
   - Lack of Accessibility: 508 compliance
   - Lack of Collaboration

> *Enterprise Relationship Management and Administration was built to make our operations' jobs a lot easier and more consistent from incumbent to incumbent. Today, my team is very dependent on the information they've accumulated and stored via email. ERMA is intended to create that consistent record across people and make information more accessible at all levels with automation of reporting.* —Shane Hatchett, Deputy Medicaid Director

THE SOLUTION:

eimagine and FSSA collaborated to configure Salesforce, a cloud hosted platform solution, to support specific process-es and programs managed by FSSA's OMPP. FSSA leader-ship selected the following subset of programs for the initial phases of the implementation:

- **HoosierRx:** Eligibility and communication and case man-agement for Indiana's state-based Prescription Drug Pro-gram for low-income seniors

- **Estate Recovery:** Managing contacts, tracking payments/recoveries, etc based on federal and state law, from a de-ceased Medicaid recipients' estate funds

- **Tracking and workflow** from onset to final approval for changes to the following Business Areas:

  - **Medicaid State Plan Amendments:** Indiana's agree-ments for Medicaid operations with the federal gov-ernment securing federal funding and legal authority

  - **Rules Promulgation:** Changes to administrative code promulgated from laws

  - **Waiver Amendment:** changes to federally-approved waivers to Medicaid program requirements, allowing the state to provide care for people who might not otherwise be eligible under Medicaid

- **Policy Consideration:** Indiana Medicaid policy consider-ation and coverage and determination decision making

- **PMO (Project Management Office):** Enterprise Project Tracker assisting in managing the lifecycle of OMPP's many projects and initiatives. Efficient and reliable ac-cess to dynamic data and information

The team configured the platform components of Salesforce using native tools to support the processes.The policy unit alone has implemented five process, 14 approval workflows and has automated over 40 document templates. As part of the innovative use of technology and to accelerate develop-ment and increase ease of maintenance, the project lever-aged several existing, click-to-install applications, including: Nintex DocGen for generating formatted documents, Shield to ensure security of the data, and Ownbackup to ensure continuity and disaster recovery/auditing capabilities. Addi-tionally, 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.

Configuration within Salesforce enables legacy system re-tirement and empowers FSSA to administer services more effectively. Salesforce maintains a multi-tenant architecture that scales securely, reliably and cost-effectively. Cloud solu-tions provide a single platform that is all centrally managed and includes three major upgrades per year

ERMA's impact is transformational for Medicaid's processes that previous relied on tribal knowledge, long-standing, antiquated, highly manual processes and unstructured communication. All modules have found the reliability, scalability, and security improvements to be significant and are able to access data and informa-tion, previously difficult to find, and track evidence-based trends.

salesforce

Salesforce em-powers 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 commu-nications and reports. Other benefits include advancing the state's Medicaid Information Technology Architecture (MITA) maturity score with the Centers for Medicare and Med-icaid Services (CMS), FedRamp certified, and 508 compliance.

IN THE INITIAL PHASE:

One Access database, two .NET systems, 23 spreadsheets and countless manual reports and emails are replaced with this one enterprise platform.

Moving to a cloud-based solution has improved reliability with

99.9% system uptime and regular patch releases.

Furthermore, the platform has secured the PHI/PII data for nearly **250,000 records and growing.**

ERMA benefits all Hoosiers on Medicaid across all 92 counties:

Increased benefit and program data security

Taxpayer dollars, both State and Federal, are used even more efficiently

Improvements upon the operationalization of legislative changes to policies and rules