30 YEARS

VIRTUAL 2020 NATIONAL RYAN WHITE CONFERENCE ON HIV CARE & TREATMENT

Keeping Up With Technology:
A Part B Program's Journey From Paper To Electronic Client Charts

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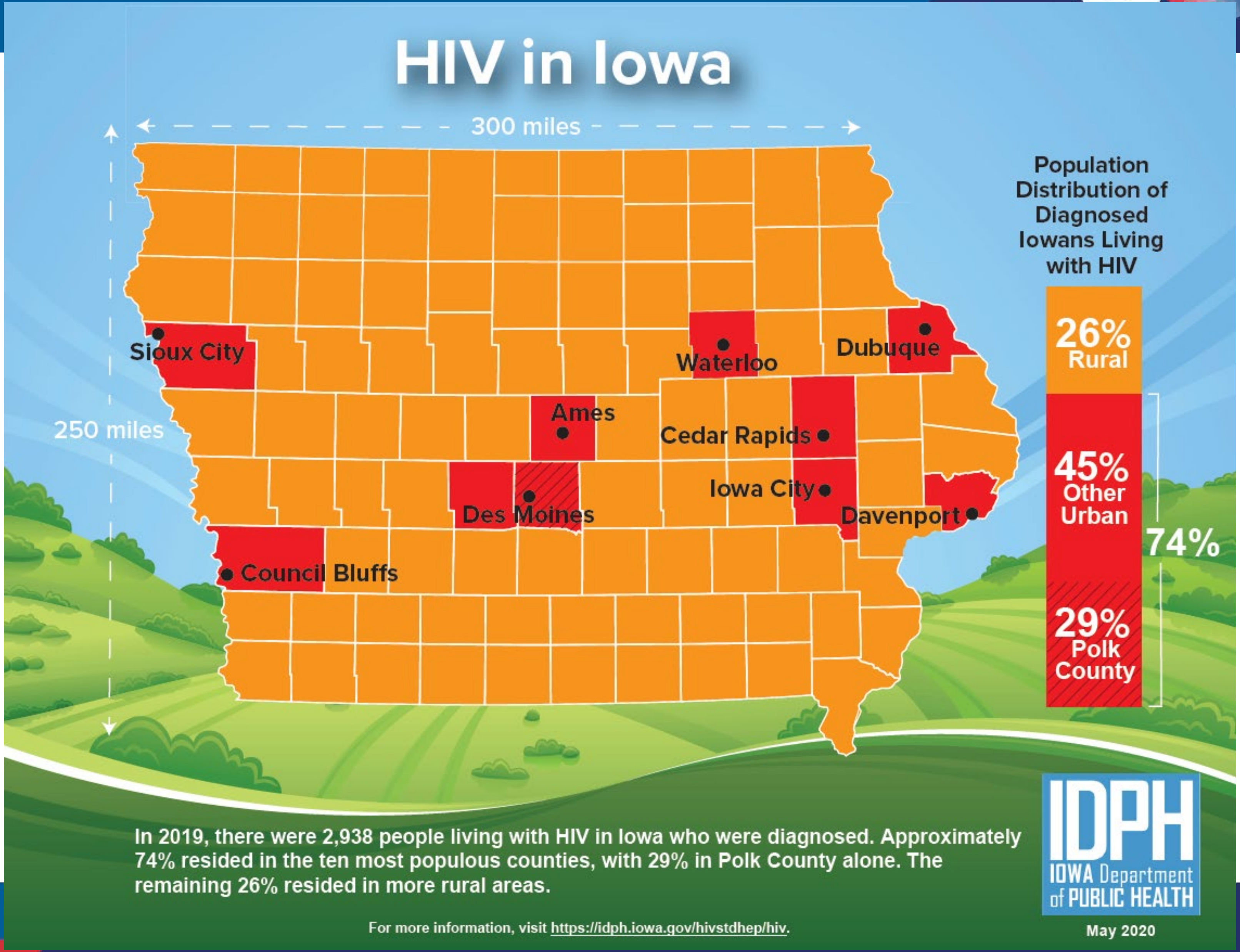
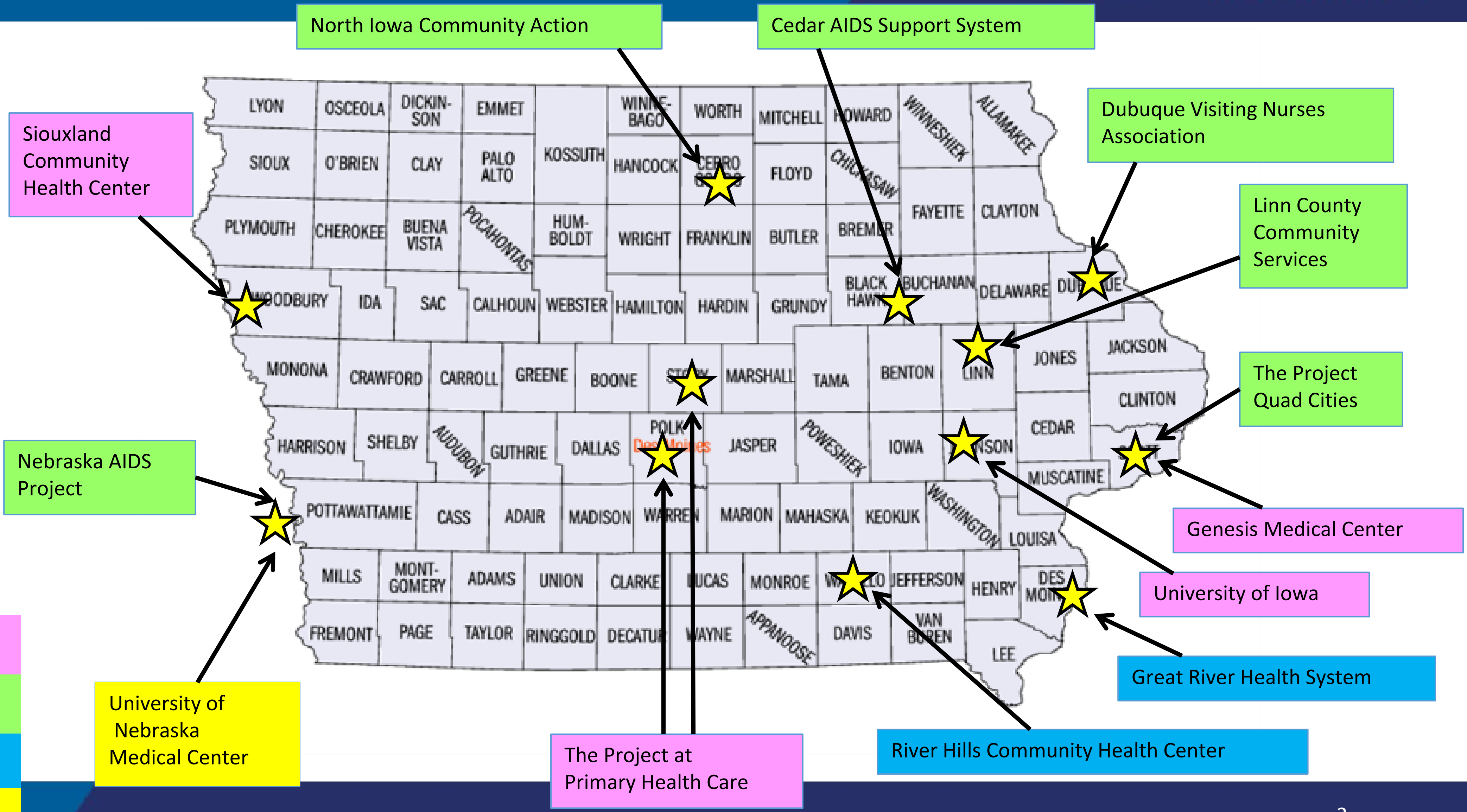
HIV Epidemic in Iowa



Part B Subrecipients



Business Needs

- Lack of space for client files in the ADAP office
- Lack of access to case management files
- Large amount of paperwork and its duplicative nature
- Antiquated technology
- Processes to reflect the programs shift towards community-based case management & working in the field
- Since COVID, now fully appreciate the need for an ECM System

ECM System Overview

- Replaces paper client files
- Not a client-facing system
  - Clients are required to be case managed for ADAP

IDPH
Users can view and edit all information in the system

NuCara Pharmacy
Contract pharmacy users can view all information in the system & process payments

Subrecipients
Subrecipient users can only view and edit information for clients enrolled in case management at their agency

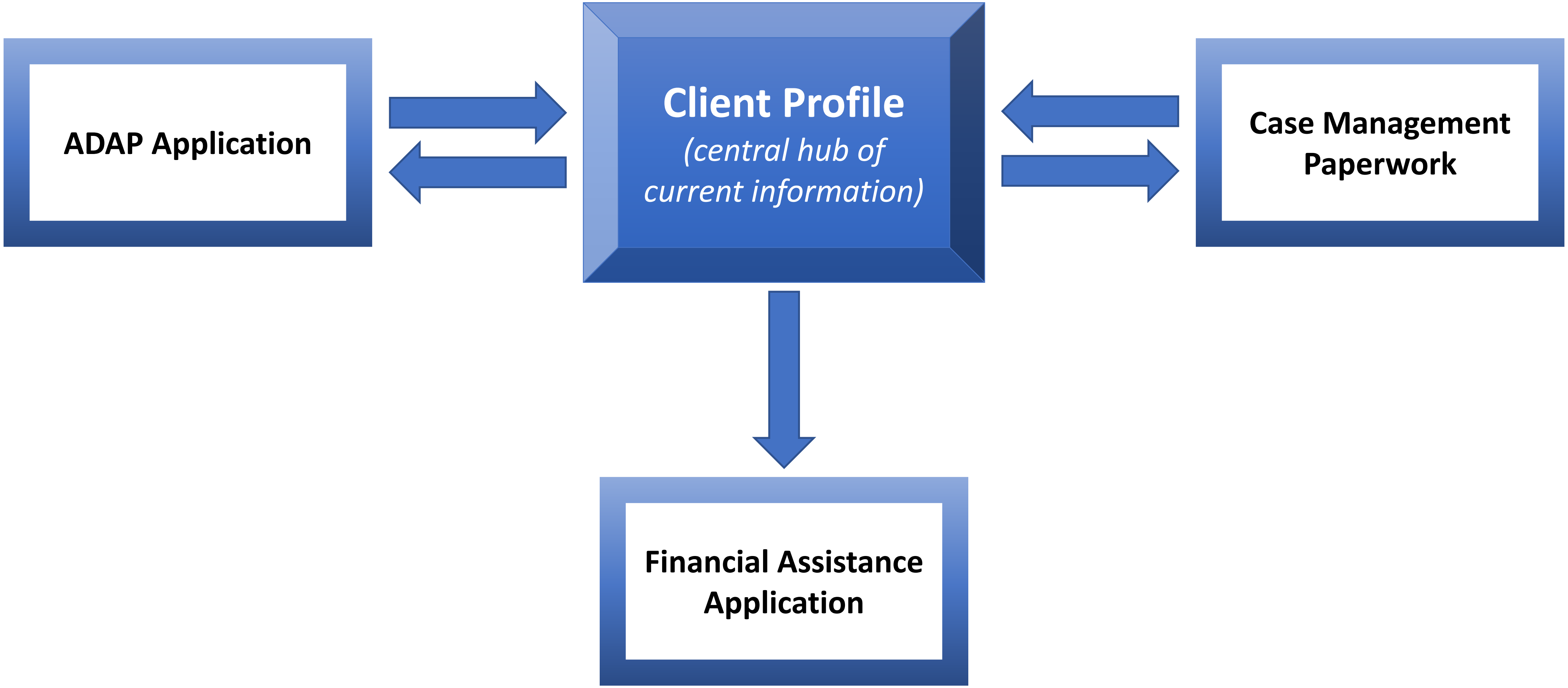
CASS	Dubuque	Great River	Linn Co.	NAP	NICAO	River Hills	SCHC	PHC	UIHC

ECM System Features

ECM System

- **Forms**
  - Case Management Paperwork
  - ADAP Application
  - Financial Assistance Application
  - Transfer/Discharge Application
- **Client Profile**
  - Eligibility Determination
  - Program Forms
  - Goals & Referrals
  - Case Notes & Services
- **Report Module**
- **Notifications & Reminders**
- **Payment Portal**

ECM System Data Flow



Request for Proposal (RFP) Process

What We Did

- Modified another program's RFP
- RFP sections:
  - Summary of program, services & needs
  - General technical requirements of the system
  - Project milestones & deliverables
  - Budget
  - System demonstrations

Lessons Learned & Recommendations

- Release a Request for Information (RFI) & learn about available technologies prior to writing an RFP
- Redesign forms & plan for programmatic changes before releasing an RFP
- Ensure shared understanding of the RFP requirements with vendor

Planned Timeline

April 2017:
Release RFP

June 2017:
Award RFP

January 2018:
ECM System Fully Developed

Spring 2018:
Training and Go Live!

Actual Timeline

2017
- **APRIL:** Released RFP
- **JUNE:** Awarded RFP, then rescinded it due to scoring tool issue
- **SEPTEMBER:** Re-released RFP
- **DECEMBER:** Awarded RFP

2018
- **JANUARY:** Planned contract start date
- **APRIL:** Actual contract start date & project began
- **MAY:** Goal 1 Kickoff Meeting in Des Moines
- **JUNE:** Hired Project Manager
- **AUGUST:** Goal 2 Kickoff Meeting in Des Moines

2019
- **JANUARY**: Goal 2 Re-Group Meeting (virtual)
- **JANUARY – DECEMBER:** Worked on Goals 1 & 2

2020
- **JANUARY:** Goal 3 Kickoff Meeting in Des Moines
- **JANUARY – JULY:** Worked on Goals 2 & 3
- **AUGUST:** Final Testing
- **SEPTEMBER:** End user training & practice
- **OCTOBER:** Go live!

Timeline

Lessons Learned & Recommendations

- Be realistic with your timeline
- Hire a Project Manager at the beginning of the process
- Be very thoughtful about who you choose to review RFPs
  - Should have both programmatic and technical knowledge

Development

Lessons Learned & Recommendations

- Ensure program staff understand the development process
- Used a shared language with vendor to minimize miscommunications
- Have the vendor spend time in the field with end users
- Create an end user steering committee to provide regular input
- Meet regularly with program staff and with the vendor
- Ensure the vendor is heavily involved in the requirements gathering process
- Take detailed meeting notes to record all decisions and reasons why they were made
- Create detailed design & requirements documents

User Acceptance Testing

Lessons Learned & Recommendations

- Create test cases for each design & requirements document
- Have vender demo all releases
- Have Project Manager test all releases to ensure features are working properly, then test together as a team
- Document test results in detail

Training

Our Plan

- Three-four day virtual training with all users of the system
- For each module/feature/form, provide a demonstration then have users practice in small group virtual breakout rooms
- Create client stories that cover situations users will frequently encounter in the system
- Following the training, have 2 weeks of independent practice prior to Go Live

Transition & Implementation

Our Plan

- One-time data dump into ECM System from CAREWare and other data sources to populate client files
- Agencies can decide how they want to enter the remaining information into client charts:
  1. Set aside a block of time to enter all client information
  2. Enter client information during next annual assessment

Demo & More Info

- Please contact us for more information or to see a demo of the system

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Thank You!