



MONTANA LEGISLATIVE BRANCH

Legislative Fiscal Division

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Director
AMY CARLSON

DATE: September 19, 2011

TO: Legislative Finance Committee

FROM: Marilyn Daumiller

RE: Department of Health and Human Services (DPHHS) Document Management System

DPHHS Implemented a Document Management System to develop and implement a paperless document/records management system that would reside at the Offices of Public Assistance (OPAs) throughout the state where staff members process applications for Medicaid, Supplemental Nutrition Assistance Program (SNAP), and the Temporary Assistance for Needy Families (TANF) programs. The DMS objectives were:

- o To allow public assistance applications and support documents to be scanned and stored in an electronic file
- o To create efficient and paperless real-time access to documents across the physical boundaries of state offices
- o To ensure efficient and safe retention and access of archived information

The Technology Services Division of DPHHS (TSD) guides project management in consort with the Human and Community Services Division (HCSD).

The system was implemented June 30, 2011 and is now "live" in the Offices of Public Assistance (OPAs) throughout the state. Permanent document conversion for all open cases was completed prior to the implementation date by a contracted service. Staff continues training on the system and is finalizing the process of converting additional pertinent data from active files while scanning applications and support documents related to new cases.

Issues have arisen including:

- o Technical issues related to the DMS system and periodic slowdowns or shutdowns
- o Work issues related to the insufficient number of scanners that were initially ordered
- o Personnel issues related to staff workload due to:
 - o The on-going dual entry on the Combined Healthcare Information and Montana Eligibility System (CHIMES) upgrade
 - o Staff turnover due to retirements or departure to other jobs

In response to the issues, DPHHS:

- o Is conducting interviews throughout the state to identify the leading causes of frustration at the OPAs
- o Hired a consultant to interview staff at the Missoula OPA and provide a third-party report

- o Is working with the OPA managers to put plans in place to address the concerns of their staff related to issues including training, business processes, communication, and staff meetings