

Health and Human Services Commission (HHSC)

**Texas Integrated Eligibility Redesign System
and Eligibility Supporting Technologies (TIERS/EST)**

**Quarterly Report
to the
Legislative Budget Board and the Governor's Office**

**As Required by Rider 152
Article II, HHSC, 2018-19 General Appropriations Act**

January 1, 2018

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1. Overview

The Health and Human Services Commission (HHSC) is submitting this report to the Legislative Budget Board (LBB) and the Office of the Governor, State of Texas, as stipulated in Rider 152 of the 2017-18 General Appropriations Act (Article II, HHSC, 85th Legislature) regarding the Texas Integrated Eligibility Redesign System:

152. Texas Integrated Eligibility Redesign System (TIERS). *Included in the amounts appropriated above in Strategy I.3.2, TIERS Capital Projects, is \$53,358,062 in All Funds (\$14,380,037 in General Revenue) in fiscal year 2018 and \$61,010,290 in All Funds (\$16,592,431 in General Revenue) in fiscal year 2019 for capital enhancements and maintenance of TIERS. HHSC shall submit quarterly reports to the Legislative Budget Board (LBB) and the Governor reflecting actual expenditures, cost savings, and accomplishments implementing the TIERS project. The report shall include a detailed plan for the project, a proposed schedule of expenditures, and the status of capital enhancement and maintenance activities for the TIERS project. Additionally, the report shall include detailed strategies developed and implemented by HHSC to restrict the TIERS project to those items presented and approved by the Eighty-fifth Legislature, 2017.*

Notwithstanding Article IX, §14.03, Limitation on Expenditures - Capital Budget, or Article II, Special Provisions Related to All Health and Human Services Agencies, §6, Limitations on Transfer Authority, HHSC may not expend funds in excess of the amounts identified in this section on the TIERS capital project without written approval from the LBB and Governor. A request to exceed the amounts identified in this section shall be considered approved unless the LBB issues a written disapproval within 30 business days after the date the LBB staff concludes its review of the proposal to expend the funds and forward its review to the Chair of the House Appropriations Committee, Chair of the Senate Finance Committee, Speaker of the House, and Lieutenant Governor. Any request for additional information from the LBB shall interrupt the counting of the 30 business days.

2. Accomplishments

HHSC shall submit quarterly reports reflecting accomplishments implementing the TIERS project.

Releases
Release 100 – Deployed September 23, 2017, implemented 54 modifications related to 17 initiatives and 64 defect fixes across all systems.
Release 101 – Cycle 1 deployed November 4, 2017, Cycle 2 development and testing completed, scheduled to deploy on December 9, 2017, Cycle 3 sprints start November 30, 2017.

2.1 Release 100 Major Accomplishments

Personal Needs Allowance (PNA) Modifications

Currently, TIERS incorrectly identifies individuals who are in a facility and receive Social Security Income (SSI) as eligible for the personal needs allotment. In addition:

- Exceptions between Service Authorization System Online (SASO) and TIERS and State Data Exchange (SDX) to TIERS are corrected in a timely manner
- Users are allowed to change the Unearned Income Type used to issue benefits or coverage instead of end-dating one type and creating the record (i.e. an unearned income record can have both RSDI and SSI during the phase of the TIERS record)

Release 100 (R100) implemented the following changes:

- TIERS will correctly identify individuals eligible for a \$30 PNA warrant
- Demographic matching logic changed to help match individuals sent through the interfaces
- Unearned Income Logical Unit of Work (LUW) no longer allows staff to change the type once the record is used to issue benefits or coverage

Limitation of TIERS SSI Certification Case Mode

Currently, the SSI Certification mode is available to a large number of staff and should be limited to specialized staff. In addition, staff might make changes that are unrelated to the SSI Certification action and because this mode does not require Eligibility Determination Benefit Calculation (EDBC) to be run, those changes are not applied to the Case/Eligibility Determination Group (EDG). EDG is a group of eligible household members for a specific program.

R100 implemented a new role that is assigned only to specialized staff responsible for performing actions related to SSI Certifications. In addition, users will not be able to make changes within data collection that are not part of the SSI Certification LUWs. A monthly DataMart report shows who has access to the SSI Certification role that allows the SSI Certification mode.

TIERS Historical Case Report Updates

The TIERS Historical Case Report primarily used by Inspector General and Quality Control staff is out of sync with TIERS and does not include all of the information they need.

R100 implemented an update to synchronize the TIERS Historical Case Report with TIERS.

Flexible Appointment

Currently, when a Temporary Assistance for Needy Families (TANF) or Type Program (TP) 08 is not denied by the automated Missed Appointment process, a Task List Management (TLM) task is created for staff to manually process and it has a due date of 'current date + 1'. When the automated process goes beyond midnight, an additional day from the missed appointment date is added.

R100 implemented a modification to the TLM task due date for TANF or TP08 missed appointments. The system will use the 'missed appointment date + 1' to calculate the missed appointment task due date to prevent an additional day being added.

Fleeing Felon

Currently, TIERS does not pend for Fleeing Felon status when an individual who is disqualified for being a Fleeing Felon reapplies with another individual who is disqualified for a different reason.

R100 implemented a modification to TIERS that will pend Fleeing Felon status in this situation.

Supplemental Nutrition Assistance Program (SNAP) Good Cause

Currently, the Texas Workforce Commission (TWC) determines good cause prior to sending a SNAP Employment and Training (E&T) sanction request to HHSC.

R100 implemented a modification to federal regulations that require SNAP eligibility staff to make a final determination of good cause on SNAP E&T prior to imposing a sanction. This results in a process where HHSC staff will make the final 'good cause' determination related to SNAP E&T sanctions.

Application Routing Cover Sheet

In an effort to improve the process of applications received in the local offices and enable the Out-stationed Worker Program (OWP) staff to fully participate in the Business Process Redesign (BPR) efforts, two new automated cover sheets were created:

- The Application Cover Sheet will be used by the Texas Works and Medicaid Eligibility for Persons with Disabilities (MEPD) benefit office staff so their non-TIERS barcoded applications faxed to the vendor can be auto-linked/auto-routed to the appropriate queue more quickly.
- The Out-stationed Cover Sheet will be used by the Texas Works OWP staff to automatically route work they are not able to complete the same day to the appropriately designated regional OWP queue. They will be able to use the cover sheet for their applications, redeterminations, changes, and missing information.

State Portal Your Texas Benefits Account Management

Currently, Your Texas Benefits and the mobile application allow individuals to create a full access account and link to their TIERS case if their Social Security Number (SSN) has not been validated by the Social Security Administration (SSA) by allowing them to enter one of the other TIERS identifiers:

- Case number
- EDG number
- Individual number

R100 implemented a modification to the Your Texas Benefits Account Management tab within the State Portal to allow staff to assist clients whose SSN has not been validated by SSA in creating a full access account or upgrading their account to full access using the other TIERS identifiers.

Ensure Continuous Medicaid After SSI Denial

R100 allows HHSC to ensure continuous Medicaid coverage for individuals who were denied SSI and who may be eligible for continued Medicaid under an HHSC-type program. The project provided denied SSI recipients information on actions needed to ensure continuous Medicaid.

Program requested Information Technology (IT) revise Form H1296 (SSI Denial Letter) to ensure denied SSI recipients receive information explaining the loss of Medicaid and any action needed to ensure continued eligibility.

TIERS was modified to recognize certain codes in the SDX interface file to identify individuals who have been denied SSI due to receipt of Disabled Adult Children's (DAC) or Widow/Widower's benefits and use that information to automatically cascade to the appropriate HHSC-type program (TP18, TP21, or TP22).

A new exception process was created for denied SSI recipients:

- TIERS was modified to recognize certain codes in the SDX interface file and send out an application with the Form H1296
- If the SDX file fails to automatically create a 'process CMA change task' a new exception task will be created and it will have a shorter processing timeframe for denied SSI recipients applying for Medicaid
- TIERS will automatically cascade to TA10 ME-Waivers when SSI is denied or suspended for excess income (N01) to avoid potential gaps in Medicaid coverage and disruptions to Managed Care for SSI recipients who also receive waiver services

Data Broker Decoupling

Data Broker recently transitioned to a new vendor. Their ID Authentication and multiplexer services are currently integrated. The ID Authentication and multiplexer services were previously integrated within the same infrastructure. This effort was to separate out the infrastructure for the various components to use separate URLs to improve performance of the Data Broker system. If maintenance is needed, the whole system comes down and YourTexasBenefits.com and mobile app users are unable to create full case access accounts.

R100 moved the ID Authentication and change verification service from the current Data Broker application into its own separate application. Decoupling the systems will allow ID Authentication to remain uninterrupted 24/7 even when other parts of the Data Broker system need to come down for maintenance.

Verint Upgrade

R100 implemented a Verint upgrade to allow Eligibility Operations (EO) Virtual Interviewing Centers the use of the Cisco Workforce Optimization Tool. This upgrade provided EO with call recording capabilities, enhanced reporting options, a system dashboard for better monitoring, and a quality management component for agencies with access to the tool. Some additional areas that will be able to benefit from this upgrade are MAXIMUS, the Department of Family and Protective Services (DFPS), Medical Transportation Program (MTP), and Texas Information and Referral Number (TIRN).

ARTS Recoupment

Currently, the Accounts Receivable Tracking System (ARTS) is not able to process all overpayments correctly which results in:

- Incorrect calculations of delinquency dates
- Non-compliance with federal rules and regulations
- Incorrect calculations that could negatively impact clients
- Millions of dollars lost to the state in Earned Federal Funds

R100 implemented modifications to ARTS and TIERS to calculate payments/overpayments correctly. In addition, the Benefits Issuance – View Overpayment Summary screen was updated to reflect new overpayment and recoupment information.

YourTexasBenefits.com Improvements

R100 implemented the following enhancements to YourTexasBenefits.com:

- Removal of the “Show Getting Started in a Proposal for Decision (PFD) page” link from the Getting Started page
- Addition of a validation indicator when the users re-typed password matches their initial password entry
- Removal of e-case sensitivity for security question responses for users whose account was created prior to Release 97 (September 2016)

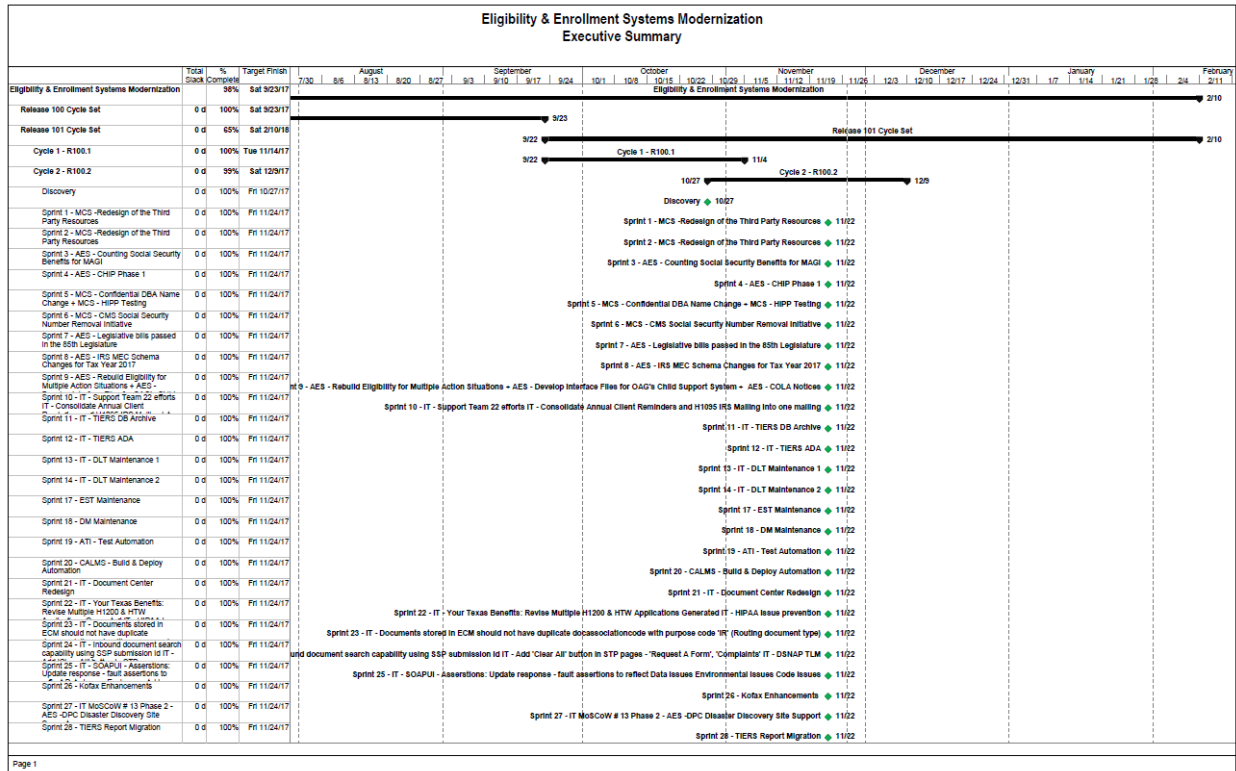
3. Project Status

Release 100			
Project Item	Report to Date		
Initial Planned Project Start and Finish Dates	04/17/2017 – 09/23/2017	Baseline Date:	04/17/2017
Last Reported Project Start and Finish Dates	04/17/2017 – 09/23/2017	Baseline Date:	04/17/2017
Current Estimated Project Start and Finish Dates	04/17/2017 – 09/23/2017	Baseline Date:	04/17/2017
Explanation of Variance between Last Reported and Current Start and Finish Dates	No variance in project dates.		
Estimated Percentage of Project Complete	R100 – 100%		
Description of Method Used to Track Progress	Hewlett Packard (HP) Project and Portfolio Management Centre; Microsoft Office Project		

Release 101			
Project Item	Report to Date		
Initial Planned Project Start and Finish Dates	09/04/2017 – 02/10/2018	Baseline Date:	09/04/2017
Last Reported Project Start and Finish Dates	09/04/2017 – 02/10/2018	Baseline Date:	09/04/2017
Current Estimated Project Start and Finish Dates	09/04/2017 – 02/10/2018	Baseline Date:	09/04/2017
Explanation of Variance between Last Reported and Current Start and Finish Dates	No variance in project dates.		
Estimated Percentage of Project Complete	R101 – 50%		
Description of Method Used to Track Progress	HP Project and Portfolio Management Centre; Microsoft Office Project		

4. Project Plan

Project Milestones	Planned Start Date	Actual Start Date	Planned Finish Date	Actual Finish Date	Percentage Complete
Release 100 Cycle Set	04/17/2017	04/17/2017	09/23/2017	09/23/2017	100%
Release 101 Cycle Set	09/04/2017	09/04/2017	02/10/2018		50%



Eligibility & Enrollment Systems Modernization Executive Summary			Gantt Chart: July 2017 to February 2018																																															
	Total Spots	% Complete	July 2017				August				September				October				November				December				January				February																			
Release readiness	0 d	0%	Fri 11/24/17																																															
Deploy Cycle 2 - R100.2	0 d	0%	Sat 1/29/18																																															
Cycle 3 - R100.3	0 d	1%	Sat 1/13/18																																															
Discovery	0 d	80%	Fri 12/1/17																																															
Sprint 1 - Redesign of the Third Party Resources	0 d	Fri 12/29/17																																																
Sprint 2 - Redesign of the Third Party Resources	0 d	Fri 12/29/17																																																
Sprint 3 - Counting Social Security Benefits for MAGI	0 d	Fri 12/29/17																																																
Sprint 4 - CHIP Phase 2 + Citizenship and Residency Verification	0 d	Fri 12/29/17																																																
Sprint 5 - MCS - Adoption Assistance/Permanency Care + AES - LTRSS Vendor Transition	0 d	Fri 12/29/17																																																
Sprint 6 - Synchronization of TIERS and MAXab: Denied TIERS Transactions + Redesign of the Third Party Resources	0 d	Fri 12/29/17																																																
Sprint 7 - Legislative bills passed in the 85th Legislature - SB1477 and Authorized Representative Updates	0 d	Fri 12/29/17																																																
Sprint 8 - IRS MEC Schema Changes for Tax Year 2017 + MCS MBI	0 d	Fri 12/29/17																																																
Sprint 9 - Develop Interface Files for OAG's Child Support System	0 d	Fri 12/29/17																																																
Sprint 10 - TIERS Report Migration from Crystal to Python	0 d	Fri 12/29/17																																																
Sprint 11 - TIERS DB Archive	0 d	Fri 12/29/17																																																
Sprint 12 - TIERS ADA Compliance w/ IE 11 TIERS IE 11 Upgrade + ADA	0 d	Fri 12/29/17																																																
Sprint 13 - DLT Maintenance 1	0 d	Fri 12/29/17																																																
Sprint 14 - DLT Maintenance 2	0 d	Fri 12/29/17																																																
Sprint 17 - EST Maintenance	0 d	Fri 12/29/17																																																
Sprint 18 - DM Maintenance	0 d	Fri 12/29/17																																																
Sprint 19 - ATI - Test Automation	0 d	Fri 12/29/17																																																
Sprint 20 - CALMS - Build & Deploy Automation	0 d	Fri 12/29/17																																																
Sprint 21 - Document Center Redesign	0 d	Fri 12/29/17																																																
Sprint 22 - Your Texas Benefits: Revise Multiple HIT00 & HTW Applications	0 d	Fri 12/29/17																																																
Sprint 23 - Enhance ECM search service to include Agency Received Date in the response (STP and DW9 support required)	0 d	Fri 12/29/17																																																
Sprint 24 - Refactor STP reference table data loading + improve the exception handling	0 d	Fri 12/29/17																																																
Sprint 25 - Flash Report - Add CP ID + CADS - Recipient Data	0 d	Fri 12/29/17																																																
Sprint 26 - Kotax - KTM Upgrade	0 d	Fri 12/29/17																																																
Sprint 27 - AES - DPC Disaster Discovery Site Support	0 d	Fri 12/29/17																																																
Release readiness	0 d	Fri 12/29/17																																																
Deploy Cycle 3 - R100.3	0 d	0%	Sat 1/13/18																																															
Cycle 4 - R101	0 d	0%	Sat 2/10/18																																															

5. Schedule of Expenditures

The report shall include a proposed schedule of expenditures for the TIERS project.

Type of Expenditure	FY2018 Schedule of Expenditures
Contracted Services	\$ 6,632,719
Hardware	\$ 7,393,821
Software	\$ 30,107,392
Total	\$ 44,133,931

6. Actual Expenditures

HHSC shall submit quarterly reports reflecting actual expenditures implementing the TIERS project.

6.1 New Development Expenditures

Project Item	Report to Date
Project Cost to Date (Fiscal)	\$ 0
Project Cost to Date (Total)	\$ 143,950,279

6.2 Operational Expenditures

Project Item	Report to Date
Project Cost to Date (Fiscal)	\$ 18,465,997
Project Cost to Date (Total)	\$ 252,068,140

7. Cost Savings

HHSC shall submit quarterly reports on cost savings for the TIERS project.

7.1 Strategies

In alignment with the State Strategic Plan for Information Resources Management published by the Department of Information Resources, the TIERS project team is strongly committed to maturing our IT resource management principles and doing more with less by implementing strategies to maximize business value while reducing costs. HHSC has already fully implemented Agile development methodologies, reducing time to deployment and the need for expensive rework, while improving quality and value delivered to the business. We are in the process of reducing dependency on staff augmentation contractors for operational workload by converting certain positions to state full time employees and eliminating other positions. We are actively recruiting talent and bringing skill sets in-house by offering prospective employees the opportunity to work with new technologies while contributing to the worthy cause of helping Texans in need. Additionally, we continue aggressively negotiating new contracts for IT services and leveraging shared services, cooperative contracts, and state bulk purchasing for best pricing and terms where possible.

7.2 Estimated Savings

Cost Savings/Avoidance Effort	Q1 Savings
Elimination of 5 Staff Augmentation Contract Positions	\$210,553
Conversion of Staff Augmentation Contract Positions to State Full Time Equivalent	\$195,373
Reduction in Rates Negotiated on New Independent Validation and Verification (IV&V) Contract	\$44,579
Elimination of Transition Costs Negotiated on New IV&V Contract	\$65,989
Reduction in Rates Negotiated on New Kofax Services Contract	\$9,152
Elimination of New Kofax Services Contract Transition Costs Due to Incumbent Providing the Best Value Proposal	\$144,480
Reduction in Scope of Mobile App Support	\$475,584
Total	\$1,145,710

8. Governance

Additionally, the report shall include detailed strategies developed and implemented by HHSC to restrict the TIERS project to those items presented and approved by the Eighty-fifth Legislature, 2017.

Social Services Applications manages changes to the Texas Integrated Eligibility Redesign System (TIERS) and supporting technologies such as Yourtexasbenefits.com, State Portal, Task List Manager, etc. The IT Governance process manages requested changes to all of the applications supported by Social Services Applications.

There are technically three major software releases each year but since the transition to an Agile Software Development Cycle in 2016, software releases now occur almost monthly depending on the contents of the given Release Charter.

To develop the Release Charter, business areas within HHSC, as well as external trading partners, submit strategic business roadmaps for system changes they need in both the upcoming fiscal year and/or the next release cycle. These roadmaps are prioritized by the submitting areas and then combined and reprioritized based on capacity within each release cycle and the number of Agile sprints required for the requested initiatives. Prioritization of initiatives is based on the Agile MoSCoW method of Must, Should, Could, and Won't; meaning the initiative is a must have, good to have, nice to have, or will not be done. The TIERS Governance Workgroup ultimately approves the final release charter.

Changes to the charter can be initiated by business and/or IT and will be vetted by impacted parties before submission to the governance workgroup. The TIERS Governance Workgroup meets monthly to update the ongoing roadmap as well as adjusting the content or sprint schedule of the release that is currently in progress; the TIERS Governance Workgroup then approves the changes.

Critical additions to a Release Cycle Set Charter must meet the following criteria:

- Mandated by Federal Government, State Leadership, and/or the HHS Executive Commissioner to be implemented within the given release cycle, or
- Failure to implement the initiative will result in clients not receiving accurate/timely benefits and there is no viable alternative process to handle, or
- Failure to implement the initiative will result in financial penalties to the State of Texas and/or HHS, or
- Any other criteria defined and approved by Governance.