

State of Oregon DHS

Ensuring Compliance with the Sugar Cube™ Appliance

Company Profile

Headquarters
Salem, OR

Company Facts
Oregon's largest state agency serving over one million citizens

Employees
9,500

2006-2007 Budget
\$10.7 billion

Key CRM Requirements
Case Management, Document Management, Email Tracking, Collaboration.

Solution
Sugar Cube Appliance

The State of Oregon's Department of Human Services (DHS) is guided by a simple of mission statement: "To help people become independent, healthy and safe." As the state's largest public agency, DHS oversees child welfare, senior and disability services, Medicaid and public health services. With a staff of 9,500 employees and a \$10.7 billion budget, DHS serves over one million residents or Oregon.

Solution Requirements

Serving over one million citizens creates large volume of information on a daily basis. One DHS division, the Office of Medical Assistance Programs (OMAP), which manages Oregon's Medicaid program, must manage communications with over 35,000 healthcare providers, including individual healthcare providers, managed care organizations, individual caretakers, as well as the federal and state government.

In 2005, the leaders of OMAP faced serious challenges complying with the Health Insurance Portability and Accountability Act (HIPAA)—a set of federal guidelines governing electronic healthcare transactions. OMAP needed a solution to communicate electronically with thousands of providers.

"We had 30 people manually tracking HIPPA compliance which introduced a lot of risk," said Bill Crowell, Chief Information Officer of DHS. "People were not on the same page. They were using sticky notes, memory, spreadsheets, Access data-

bases—anything they could get their hands on to track the case load. All the information was personalized and could not be shared and there was no reporting capability for management."

DHS and OMAP faced a tight deadline for HIPPA compliance or they would have to revert all transactions to paper. "We saw a need to manage a complex set of communications with a customer relationship management system," said Crowell. "As a state agency, we knew the evaluation of a CRM system would take six months and the implementation would take another 12 months."

Going to Google and Finding Sugar

Recognizing that DHS and OMAP could not wait another 18 months to have a CRM system operational, a System Architect within DHS looked to the web for a solution. The next day, he presented some exciting news to Crowell. "One of our Senior Architects went to Google and typed in 'open source CRM' and found SugarCRM®," says Crowell. "He down-

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Bill Crowell
Chief Information Officer
State of Oregon



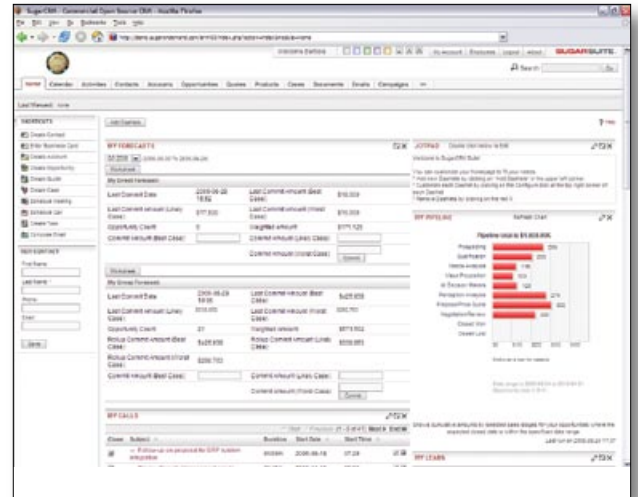
loaded the application with full documentation 24 hours after our initial meeting. We knew we found a solution that had the features and the time-to-market we needed. We were excited”

Immediately, Crowell’s team instituted a pilot of Sugar Open Source that ran for four months. The team found that the case management and collaboration components met the needs of its users. Providers noticed an improvement as well. “Soon after the SugarCRM roll-out, I started getting calls from providers commenting that we really seemed to be on the same page in terms of providing consistent responses and sharing information,” said Crowell.

Turning to the Sugar Cube

With the success of the pilot, Crowell’s team decided to expand the use of SugarCRM. DHS contacted SugarCRM and ordered two Sugar Cube™ Appliances, turn-key servers that come configured with the Sugar Professional. “We needed a solution that was secure, accessible, and easy-to-use,” said Crowell. “Sugar Cube met all the criteria.”

Using the Sugar Cubes, DHS and OMAP delivered the near impossible: OMAP became HIPPA compliant and did not have to revert to paper-based transactions. “This was one of the great successes within DHS over the last year,” said Crowell. “We achieved HIPPA compliance, delivered a centralized and secure data set with reporting capacities that were extremely easy to use. We were expecting 60,000 claims per month that were electronic would go back to paper. With SugarCRM, we only had to process 37 paper-based claims. This was an enormously successful effort. We would have had to have hired hundreds of people to process the case load and the error rates would have been much higher.”



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Looking to the State House

With the success of SugarCRM within OMAP, DHS is looking at other ways the organization can use SugarCRM to improve communications. As the Oregon state legislature convenes in 2007, DHS is looking to better automate communications with the legislature. Says Crowell, “We plan to use this application to track all the communications with state government. SugarCRM will be the central repository of all communications with the legislature. This system will help us speak with one voice.”



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