

Report to the Area Agency on Aging of Dane County
On the 2017 Special Project Fund Grant
Awarded to the North/Eastside Senior Coalition
On behalf of East Madison Monona Coalition of the Aging,
South Madison Coalition of the Elderly and West Madison Senior Coalition

Project Title: Madison Senior Coalitions Case Management Data Base

Amount of Money Awarded: \$13,807

Purpose of the project:

- To develop an online data storage system that allows the four Madison Senior Coalition's to share access to client case management and home chore files.

Project tasks:

- The coalitions explored options for a shared online database and data storage system and selected the EMMCA database as one to use for all four Madison Senior Coalitions for these reasons:
 - This database was designed for EMMCA's case management and home chore programs.
 - The EMMCA database is an intuitive, simple to use system.
 - The EMMCA database is password protected to ensure client confidentiality.
 - The EMMCA case management portion of the database is designed to match the data gathering and reporting requirements of case management funders Dane County, City of Madison, City of Monona and United Way.
 - The EMMCA home chore portion of the database is designed to match the data gathering and reporting requirements of home chore funders City of Madison, City of Monona and United Way.
- The money from the grant was used to pay the database designer to expand the database for all four Madison Senior Coalitions and to make improvements and upgrades to the database so that it suited the needs of all four agencies for both the case management and the home chore programs. A draft version of the new database, PERKS, was completed in early December, and it is being updated to reflect suggestions made by staff from other coalitions. Important features of the PERKS database as it was expanded and made accessible at various locations include:
 - Security: The PERKS database and associated application are hosted with Microsoft Azure (cloud hosting). The database is behind a firewall that only allows the developer and the application access to the data. The application uses SSL to encryption the data over the internet. It also uses Spring Security, which is a tried and trusted security tool to prevent unauthorized users access to the application. All attempts at unauthorized access are logged and monitored.
 - Confidentiality: Confidentiality and HIPPA compliance with the PERKS database is ensured by password protection. Each user has their own password needed to access the PERKS database. Everyone who has access to the PERKS database has signed a confidentiality form.
 - Limited access: The PERKS database is only accessible to case managers, home chore coordinators, executive directors and administrative assistants. Administrative assistants only have viewing access, case managers, home chore coordinators and executive directors have read and write access, and the PERKS database administrator (EMMCA and West's shared administrative assistant) has edit access.
- Grant money also was used to hire an EMMCA administrative assistant for additional hours to work with the database designer and EMMCA staff members to write manuals for using the case management/home chore database. These manuals were completed in December 2017, but are being updated to reflect changes that are being made in the PERKS database.

Project timeline:

- The draft version of the PERKS database and the first public version of the case management manual were used by EMMCA staff to conduct a training on December 13, 2017 for the Executive Directors and the Lead Case Managers of the other three Madison Senior Coalitions.
- The draft version of the PERKS database and the first public version of the home chore manual were used by EMMCA staff to conduct a training on February 6, 2018 for the Home Chore Director and the Home Chore Coordinators of the other three Madison Senior Coalitions.
- This draft version of the PERKS database and the first public version of the two manuals were rolled out to the executive directors, lead case managers and home chore coordinators of the other three Madison Senior Coalitions for them to test at the end of 2017 and early in 2018.
- Improvements were made to the PERKS database based on feedback from the other Madison Senior Coalitions. Corresponding updates to the database manuals were made.
- In March 2018, client information from West Madison Senior Coalition was entered into the PERKS database by EMMCA and West's shared administrative assistant. This is the EMMCA staff member who wrote the database manuals.
- In April and May 2018, client information from South Madison Coalition of the Elderly and NESCO will be added into the PERKS database by this same administrative assistant.
- As each Coalition has their client information added to the PERKS database, EMMCA staff members will conduct individual trainings for that Coalition to get all of their case managers and their home chore coordinator familiar with using the PERKS database. From then on each case manager and home chore coordinator can enter client demographic information, case notes, and service plan information into the PERKS database. EMMCA staff members will be available to help trouble shoot and provide ongoing support.
- EMMCA staff will work with the other coalitions to help them learn how to generate reports from the PERKS database. The PERKS database can be used to generate many reports including:
 - County intake form
 - County assessment form
 - SHIP sheets
 - WimCR reports
 - 600 form
 - 610 report
 - Rosters of clients by various types or characteristics
 - Rosters of home chore volunteers by various types or characteristics
 - Information and trends for City of Madison, City of Monona and Dane County Quarterly Reports
 - Trends, demographic information and contract compliance for year end reports

Project outcomes and the relationship between the PERKS database and the merger of the four Madison Senior Coalitions:

As the four Madison senior coalitions are merging into one agency to serve seniors in Madison and Monona, the desire has been to implement best practices in all of our programs. The goal of updating and expanding the EMMCA database into one unified PERKS database for all four Madison Senior Coalitions to use is to provide one place where all information can be entered for case management and home chore clients for the city of Madison. This will facilitate the following best practices:

- Confidential storage of client information
- Uniform gathering, tracking and reporting of information
- Timely and accurate record keeping
- Ease in tracking client activity and goal achievement
- Ease in providing oversight of case management and home chore work
- Ease in generating information for funder reports
- Ability to generate trend reports from case management and home chore data
- Sharing information between agency case managers and home chore coordinators
- Sharing information between case managers when another staff member from throughout the Madison area has to pick up for a colleague

Client Information ()		
First Name *	Last Name *	Birth Date (m/d/yyyy)
<input type="text" value="first name"/>	<input type="text" value="last name"/>	<input type="text" value="m/d/yyyy"/>
Preferred Name	Gender	Marital Status
<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="v"/>
Address	City	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone	Cell Phone	
<input type="text" value="() -"/>	<input type="text" value="() -"/>	
Work Phone	Email Address	
<input type="text" value="() -"/>	<input type="text"/>	
Enrolled in a long-term care program	Race-Ethnicity	
<input type="text" value="v"/>	<input type="text" value="v"/>	
Veteran	Medicare?	Medicaid?
<input type="text" value="v"/>		
Referral Information ()		
Living Situation ()		
Financial ()		
<input type="button" value="Save"/>	<input type="button" value="Cancel (/perks/client/index)"/>	<input type="button" value="Missing First or Last Name"/>

