

Appendix 7: Key Current Client Functional Processes

Key Process	Process Description	Frequency/ Volume	Technology Used
Functional Area: Patient Services			
Eligibility Determination for Services	Determine eligibility for services and schedule first Appointment	90% of Eligibility Staff resources Schedule 25-30 first appointments per day	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and EZ Cap
Eligibility Determination for Medications	Determine benefit eligibility for medications, research medications and review pharmacy claims	100% of Pharmacy staff resources in Patient Services	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and WHI
Appointment Scheduling	Schedule patient appointments	80-150 daily	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and EZ Cap
Project Access	Manage Project Access cases – specialty care work with Seton to coordinate specialty referrals	2 per week	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and EZ Cap
Nurse Case Management	Manage selected patient cases based on criteria regarding patients with catastrophic illnesses or other problems	2 per day in network 2 per day out of network	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and EZ Cap
Quality Improvement	Monitor events, safety equipment, patient access to prevent risk. Monitor clinical business events to identify and prevent fraud. Report outcomes	80% of Q/I staff	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and EZ Cap
Quality Improvement for MAP	Same as above for MAP population and Brackenridge specialty care	100% of assigned staff	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and EZ Cap
Credentialing	Ensure that providers and clinical staff have the appropriate licenses and perform background checks	100% of assigned staff	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: web-based licensing/board resources
Validation of Clinical Decisions	Validate all clinical decisions, denials, reporting and monitors/ accesses program development	30% of Senior Medical director position	Hardware: Workstation, printer, telephone, fax, scanner, internet access

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			Software: Medicaider, NextGen and EZ Cap
Manage Contracts	Manage contracts supervised by Patient Services	100% of assigned staff	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Medicaider, NextGen and EZ Cap
Functional Area: Clinic Operations (including pharmacy)			
Patient Registration	Process patients upon arrival at clinic	200,000 medical encounters annually	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and File Tracker software
Intake	Process patient including checking vital, documenting chief compliant, printing out chart	200,000 medical encounters annually	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and File Tracker
Patient Encounter	Provide medical care/treatment to patient/coordination of care with other providers. Includes all clinical staff.	200,000 medical encounters annually	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen
Discharge/ Dismissal	Capture patient medical outcomes and payment disposition information on EMR/EPM records	200,000 medical encounters annually	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and File Tracker
Triage	Respond to patient calls/inquiries during office hours, 4:45 – 7:45 pm and on weekends and holidays	6 FTE nurses plus 1 position after hours as needed	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and File Tracker
Nurse Staff Development	Provide continuing education for nurses online, at monthly nurses meeting and other opportunities	1 hour per month plus other opportunities	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and File Tracker
Provider Peer Review	Review patient records (EMRs) for accuracy and appropriateness	8 to 10 per provider annually	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen
Provider Compliance Training	Continuing Medical Education provided online	monthly	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: web-based vendor applications
Provider	Supervise, conduct performance	4 hours/wk per lead	Hardware: Workstation, printer, telephone, fax,

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Management	evaluations, coordinate schedules	provider plus 60% of medical director position	scanner and internet access Software: NextGen and File Tracker
Provider On Call	Support nurses and direct disposition of abnormal lab results outside of normal business hours	3 weeks/ year for each family practice and internal medicine provider	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and File Tracker
Pharmacy Manufacturing	Repackage and relabel prescriptions and vaccines for distribution to Class D pharmacies	1 FTE	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and Label makers
Medications	Dispense medications to CHC patients	400 per day	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and QS1
Class D Pharmacy Inspections	Inspect Class D pharmacies in clinics weekly	.4 FTE	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and UnitStock
Clinical Pharmacy Peer Review	Review prescription records for accuracy and appropriateness	60 per month	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and QS1
Pharmacy Management	Supervise, conduct performance evaluations, coordinate schedules of pharmacists	70 hours per week	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen and QS1
Functional Area: District Administration			
District Financial Operations			
Accounts Payable	Process invoices and expense reimbursements for payment (interfaces with banking software)	70+ paper checks per month (EFT in progress)	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: SAGE MIP, web-based banking application
General Ledger	Maintain General Ledger	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: SAGE MIP
Budgeting	Develop and monitor budget	Seasonal and daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access

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			Software: SAGE MIP, Excel
Financial Reporting	Develop and disseminate monthly, quarterly and annual financial reports	Monthly	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: SAGE MIP
Banking	Monitor banking activities	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: web-based bank application
Cash Management	Monitor and approve investment activities	As needed	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: web-based vendor application
Purchasing	Requisition and order supplies. Solicit for specialized items.	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: RFP Depot (ASP) and web-based vendor application (Office Depot)
Inter-governmental transfers	Input data to Texas state comptrollers office for payment of funds	Monthly	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: web-based application
Retirement Funding	Prepare and process payments to two companies to fund retirement	Monthly	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: web-based vendor application
District Human Resources			
Payroll Administration	Establish employees in payroll including pay rate, deductions, benefit elections. Add/ change/ delete benefits and pay rates. File tax returns	10+ per month	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Paychex (Future to be determined)
Time Keeping	Prepare, review, submit time sheets to outside vendor for processing	14-20 every two weeks	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Paychex (Future to be determined)
Online Job Posting and	Post positions on line and accept and track responses	To be determined	Hardware: Workstation, printer, telephone, fax, scanner and internet access

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Applicant Tracking (Future)			Software: To be determined
Human Resources Administration	Perform major functions such as: leave management, employee orientation/administration, benefits administration, performance management, compensation, etc.	50 employees	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: To be determined, currently processes and tools are very manual.
Staff Development	Provide continuing education to employees using online, in-house and external resources	50 employees	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: To be determined
District Planning and Development			
Strategic Planning	Develop long range and focused plans	Annually	Hardware: Workstation with sufficient memory capacity to run programs listed below and sound to allow for audio-conferencing; printer (b/w and color), fax, scanner, internet access Software: MS Office Suite including Outlook, Access; GIS or other mapping software; SPSS, crystal reports, Adobe, MS Visio, Publisher, Project
Business Reporting	Creation of report formats and reports to display progress in meeting operational and strategic goals	On-going	Hardware: Workstation with sufficient memory capacity to run programs listed below and sound to allow for audioconferencing; printer (b/w and color), fax, scanner, internet access Software: MS Office Suite including Outlook, Access; GIS or other mapping software; SPSS, crystal reports, Adobe, MS Visio, Publisher, Project
Data Analysis and Decision Support	Providing analyzed data to support recommendations to board on strategic objectives and business opportunities	On-going	Hardware: Workstation with sufficient memory capacity to run programs listed below and sound to allow for audioconferencing; printer (b/w and color), fax, scanner, internet access Software: MS Office Suite including Outlook, Access; GIS or other mapping software; SPSS, crystal reports, Adobe, MS Visio, Publisher, and Project . Also Access or other database-, actuarial-,

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			and root-cause analysis software.
Community Planning	Working with community partners to create shared goals, track progress in meeting goals, and report on community health status	On-going	<p>Hardware: Workstation with sufficient memory capacity to run programs listed below and sound to allow for audioconferencing; printer (b/w and color), fax, scanner, internet access, laptop and direct projector to provide off-site presentations.</p> <p>Software: MS Office Suite including Outlook, Access; GIS or other mapping software; SPSS, crystal reports, Adobe, MS Visio, Publisher, Project. Potential need for video-conferencing tools.</p>
Government Relations	Working with local delegation and governmental leadership to educate on local issues and advocate for positions of interest to TCHD	On-going	<p>Hardware: Workstation with sufficient memory capacity to run programs listed below and sound to allow for audioconferencing; printer (b/w and color), fax, scanner, internet access, laptop and direct projector to provide off-site presentations.</p> <p>Software: MS Office Suite including Outlook, Access; GIS or other mapping software; SPSS, crystal reports, Adobe, MS Visio, Publisher, Project. Potential need for video-conferencing tools.</p>
Revenue Generation	Identifying and pursuing potential new revenue sources to diversity TCHD funding	On-going	<p>Hardware: Workstation with sufficient memory capacity to run programs listed below and sound to allow for audioconferencing; printer (b/w and color), fax, scanner, internet access, laptop and direct projector to provide off-site presentations.</p> <p>Software: MS Office Suite including Outlook, Access; GIS or other mapping software; SPSS, crystal reports, Adobe, MS Visio, Publisher, Project. Potential need for video-conferencing tools.</p>
Compliance	Ensuring that services provided are in accordance with all established regulations	On-going	<p>Hardware: Workstation with sufficient memory capacity to run programs listed below and sound to allow for audioconferencing; printer (b/w and color), fax, scanner, internet access, laptop and direct projector to provide off-site presentations.</p>

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Key Process	Process Description	Frequency/ Volume	Technology Used
			Software: MS Office Suite including Outlook, Access; GIS or other mapping software; SPSS, crystal reports, Adobe, MS Visio, Publisher, Project. Access or other database-, data analysis-, and root-cause analysis software, integrated complaint-,risk management- and compliance systems.
District Communications			
Internal Communications	Communicate with board and employees of District and CHC	Ongoing	Hardware: Workstation, printer, telephone, fax, camera, scanner and internet access Software: Multiple graphic packages (e.g. Adobe)
External Communications	Communicate with external stakeholders including community members, elected officials and media	Ongoing	Hardware: Workstation, printer, telephone, fax, camera, scanner and internet access Software: Multiple graphic packages (e.g. Adobe)
Website Maintenance	Manage content on District website	Ongoing	Hardware: Workstation, printer, telephone, fax, camera, scanner and internet access Software: Adobe, web content management software
Media	Prepare press releases, respond to requests for information, tape board meetings and training sessions, develop newsletters, brochures and other information	Ongoing	Hardware: Workstation, printer, telephone, fax, camera, scanner and internet access Software: Multiple graphic packages (e.g. Adobe)
Functional Area: CHC Administration			
CHC Finance			
Accounts Payable	Process invoices and expense reimbursements for payment	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS (Future: SAGE MIP)
General Ledger	Maintain General Ledger	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS (Future: SAGE MIP)
Budgeting	Develop and monitor budget	Seasonally	Hardware: Workstation, printer, telephone, fax, scanner and internet access

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Key Process	Process Description	Frequency/ Volume	Technology Used
			Software: AFS and ECOMBS (Future: SAGE MIP)
Financial Reporting	Develop and disseminate monthly, quarterly and annual financial reports	Monthly	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS (Future: SAGE MIP)
Grant Accounting	Maintain grant accounts	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS (Future: SAGE MIP)
Capital Projects	Maintain capital projects budget and expenditures	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS (Future: SAGE MIP/FAS)
Revenue Management	File claims for payment from 3 rd party payers, monitor, analyze and report payments	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS, NextGen and various web-based software (Future SAGE MIP with NextGen interface)
Asset Management	Record assets in accounting system and monitor physical inventory	Daily	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS (Future: SAGE FAS)
Grant Writing	Prepare grant applications and monitor application process	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: AFS (Future: SAGE MIP)
CHC Human Resources			
Payroll Administration	Establish employees in payroll including pay rate, deductions, and benefit elections Add, change delete benefits and pay rates. File tax returns	500 employees annually	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Banner (Future To Be Determined)
Time Keeping	Prepare, review and submit timesheets to outside vendor for processing	430 employees annually	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Banner (Future To Be Determined)
Performance	Post positions on line and accept	430 employees mid	Hardware: Workstation, printer, telephone, fax,

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Evaluations	and track responses	year and annual evaluations	scanner and internet access Software: (Future To Be Determined)
Online Job Posting and Applicant Tracking	Post positions on line and accept and track responses	15-25 vacancies at any given time	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: ECareer (Future To Be Determined)
Staff Development	Provide training for employees based on position level and function – currently performed by CHC and the City of Austin	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Various (Future To Be Determined)
CHC Decision Support			
Strategic Planning	Develop long range and focused plans based on internal and external information	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen, Crystal reports, Mediview, EZCap, WHI, LabCorp, various mapping, GIS and statistical tools and resources
Research	Process and analyze data, research special projects, and develop reports	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: NextGen, Crystal reports, Mediview, EZCap, WHI, LabCorp, various mapping, GIS and statistical tools and resources
Business Planning			Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Microsoft Project, NextGen, Crystal reports, Mediview, EZCap, WHI, LabCorp, various mapping, GIS and statistical tools and resources
Collaborative Coordination	Coordinate CHC activities for various collaboratives	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Microsoft Project, NextGen, Crystal reports, Mediview, EZCap, WHI, LabCorp, various mapping, GIS and statistical tools and resources
Grants and Operational	Prepare required and requested reports	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access

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Reporting			Software: Microsoft Project, NextGen, Crystal reports, Mediview, EZCap, WHI, LabCorp, various mapping, GIS and statistical tools and resources
Community /Special Projects	Coordinate community and special projects	As requested	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Microsoft Project, NextGen, Crystal reports, Mediview, EZCap, WHI, LabCorp, various mapping, GIS and statistical tools and resources
Policy and Procedures	Develop policy and procedures for CHC	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Microsoft Project, NextGen, Crystal reports, Mediview, EZCap, WHI, LabCorp, various mapping, GIS and statistical tools and resources
CHC Communications			
Internal Communications	Communicate with CHC employees	Daily	Hardware: Workstation (MAC for graphic productions and video editing), printer, telephone, fax, video camera, scanner and internet access Software: Adobe, Creative Sweep, Pages, Final Cut Pro, I Photo, I Movie, IDVD and other software
External Communications	Communicate with external stakeholders including the community, media, and legislative bodies	Ongoing	Hardware: Workstation (MAC for graphic productions and video editing), printer, telephone, fax, video camera, scanner and internet access Software: Adobe, Creative Sweep, Pages, Final Cut Pro, I Photo, I Movie, IDVD and other software
Media	Prepare press releases, respond to requests for information, develop electronic communications, videos, newsletters, brochures and other information	Ongoing	Hardware: Workstation (MAC for graphic productions and video editing), printer, telephone, fax, video camera, scanner and internet access Software: Adobe, Creative Sweep, Pages, Final Cut Pro, I Photo, I Movie, IDVD and other software
Website Maintenance	Manage content on CHC website and CHC intranet	Ongoing	Hardware: Workstation (MAC for graphic productions and video editing), printer, telephone, fax, video camera, scanner and internet access

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			Software: PLONE, Adobe, Creative Sweep, Pages, Final Cut Pro, I Photo, I Movie, IDVD and other software
Grant Writing	Prepare grant applications and monitor application process	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner and internet access Software: Multiple (some may be grantor-specific)
Information Technology			
IT Planning	Develop long range and project level IT plans, monitor and evaluate implementation	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
IT Project Management	Manage IT project initiatives	Ongoing	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
IT Hardware Acquisition	Support users in defining hardware needs and making purchases	Annually as part of budget cycle and as needed	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
IT Software Acquisition	Support users in defining software needs and making purchases	Annually as part of budget cycle and as needed	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
CTM Liaison	Coordinate work with City of Austin CTM department	20% of IS manager position	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
Application Maintenance and Support	Maintain CHC specific application software and support users	95% of 2.5 IS FTE and 10% of IS manager position	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
Hardware Maintenance and Support	Maintain CHC hardware and support users	3 FTEs (currently in City of Austin CTM)	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
SQL Support	Provide support for SQL Servers	1.5 FTEs plus SQL data base administrator support	Hardware: Workstation, printer, telephone, fax, scanner, internet access

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		from CTM	Software: Multiple CHC software applications
Help Desk	Respond to user questions and inquiries, maintain help desk software	1 CHC FTE and 1 FTE City of Austin CTM	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications
Remote Employee Access	Provide access to Client systems	As needed	Hardware: Workstation, printer, telephone, fax, scanner, internet access Software: Multiple CHC software applications

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