

STEVE DUFF LLC PROJECT PLAN

CLIENT: Centerpoint Health
PROJECT NO: CPO20080212 DATE: 2/25/2008
PROJECT NAME: Centerpoint Health Outcomes Conversion

SUMMARY

Centerpoint Health recently restructured its organization and needs to convert its current outcomes system to work properly under the new structure. The new structure has 4 UPIDs and a matrix combination of 5 lines of business and 12 locations. No outcomes have been submitted to the Hamilton County Mental Health and Recovery Services Board since January 1, 2008. Talbert House have given an assurance to the Board that outcomes for January through March 2008 would be sent electronically to the Board no later than March 31, 2008.

Before the outcomes conversion can begin, all of the new programs, clinics, and UPIDs must be correctly configured in CATT. The conversion itself involves making changes to the outcomes configuration data for 28 existing programs plus Roselawn, updating the outcomes data in 278,000 records, adding new fields to the data structure, and testing and verifying that all outcomes functionality works properly. In addition, there seem to be some known problems with the current functionality of the CATT Archive screen and a few opportunities to enhance the existing functionality of outcomes.

Steve designed and implemented the current outcomes system in CATT several years ago. He has a detailed knowledge of the current configuration, underlying data structure, and business processes involved. The specific changes that will be made to CATT are listed in detail in the next section. Once the changes are made, Steve will work closely with QCS to test the functionality and then with IS to deploy the changes in CATT. Finally, Steve will provide updated documentation and additional training as needed.

SCOPE OF WORK

The scope of this project can be divided into 5 categories: system evaluation, prerequisite assistance, outcomes conversion, additional enhancements, and documentation and training. Underneath each category, each deliverable is numbered to indicate the order in which it will be completed.

System Evaluation

1. Review the functionality of the CATT Archive screen.

It appears that users are having problems with this screen. Norcen users have noticed that use of this screen can cause data to show up later in unexpected places in CATT. Lesa Zimmer has also reported that the list of clients on this screen is not inclusive enough. Steve will research the problems with this screen and make any necessary changes to CATT to resolve the issues. Note: any changes to CATT programming will be compiled by IS.

Prerequisite Assistance

2. Assist with the configuration of new program/clinic/upid structure in CATT program and clinic tables.

This is most likely a finance responsibility and is being led by Maury Ripley. Steve will offer his assistance to Maury and others involved to help complete the new configuration. It is unknown at this time exactly how much more work needs to be done in this area. However until the new CATT configuration is fully implemented, it will be very difficult to make significant progress on the outcomes conversion.

Outcomes Conversion

3. Convert the existing outcomes program configuration into the new Centerpoint structure.

The program configuration for outcomes involves identifying which programs have primary and secondary responsibility for outcomes and which programs can share outcomes responsibilities in the case of a program transfer. This may also involve adding a service site field to the outcomes program configuration tables in order uniquely identify specific program configurations in the new structure. It also involves making sure that the new UPID structure for outcomes programs is compatible with existing logic in CATT. If not, some programming changes will have to be made to CATT in order for the new UPIDs to work.

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Outcomes Conversion (continued)

4. Convert outcomes data for all programs into new Centerpoint structure.

All outcomes data is contained in 6 SQL server tables (one for each survey) and stored by program name and UPID. All records will have be updated with the new Centerpoint program names and UPIDs. In addition, depending on how the new structure is implemented in CATT, we may need to add a service site field to each of the 6 tables to properly identify a program.

5. Test and verify that all outcomes functionality works correctly using the new Centerpoint structure.

Once the outcomes configuration and data are converted, a thorough review of all outcomes functionality in CATT must be conducted. The testing and verification process will include reviewing the following features: creation of ghost records, data entry, reports, sending surveys to the Board, sending a test file of all six formats for each of the three new UPIDs to the Board for approval, and verifying proper CATT outcomes administration.

6. Make changes to code, logic, and data structure as necessary.

It is very likely that we will have to make changes to the code, logic and data structure of CATT to enable the Centerpoint conversion. All changes will be made by Steve in a test copy of the system and further tested to ensure the changes work as intended. Once the test version is ready, Steve will also work closely with QCS to coordinate additional tests by selected users in the testing environment.

7. Coordinate a new compile of CATT and roll it out with IS as necessary.

In the likely event that a new compile of CATT is required to rollout necessary changes to the outcomes functionality, Steve will coordinate the compile and rollout with IS and follow the standard IS procedures for rolling out the changes to CATT in the live environment. Once the compile and release is complete, Steve will test the functionality again in the live environment to ensure that everything is working properly.

8. Set up Roselawn for CATT outcomes.

In addition to the conversion of existing programs to the new Centerpoint structure, Steve will complete all necessary tasks to set up Roselawn (a.k.a. Norcen) for CATT outcomes. This will likely be coordinated with help from Maury Ripley and will involve contacting the Board for an export of all historical Norcen outcomes data and importing the data into CATT for current Roselawn clients based on UCI. In addition, Steve will work closely with Tracey Johnson to ensure that Roselawn is configured properly for future outcomes administration in CATT.

Additional Enhancements

9. Improve data integrity.

Steve will remove all Consumer B ghost records from CATT after a specified cut-off date because there are not any programs that use the Consumer B survey any more. Also, based on a request from Lesa Zimmer, Steve will create a standard automated report that will show which users are closing orders when they should be transferring them. Lesa knows the exact logic for the query and will share that information with Steve. The report will be available to all users in CATT's standard report screen.

10. Make client outcomes list work when using combined cost centers.

When outcomes was originally implemented in CATT, combined cost centers did not exist. However, it would now be a huge productivity boost to make the client outcomes list available when using combined cost centers.

11. Explore opportunities to improve the process for submitting outcomes files to the Board.

Lesla Zimmer has some ideas that she would like to share with Steve to make the submission process more efficient. It will take some time to explore the ideas and implement any changes that are recommended.

Documentation and Training

12. Update documentation and provide additional training as needed.

After the work described above is completed, it may be necessary to update documentation and provide training.

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RELEVANT EXPERIENCE

Steve Duff will serve as the project manager and developer for this project. Here are a few highlights about Steve.

- Computer Science degree from Cornell University, 1993.
- 15 years of professional database development using MS Access and SQL Server.
- Microsoft Certified Expert in Microsoft Access and Excel.
- Successfully completed more than 40 database projects very similar to this one.
- Experienced with medical data.
- Experienced with billing systems.
- Experienced with payroll systems.

LEVEL OF ACCESS NEEDED

In order to complete this project, Steve will need the following access for the duration of this project:

- Developer-level access to the CATT development environment
- User-level access to CATT Live (to observe current problems in Live)
- Latest copy of the uncompiled CATT application
- Latest copy of Cattcode

All development, evaluation, testing, and changes will be made in a copy of the CATT development environment. All changes that need to be made to CATT Live will be coordinated through IS.

TIMEFRAME AND BILLING

The project start date is Monday, February 25, 2008. The completion date is Monday, March 31, 2008. Steve will plan to work with IS the week of Monday, March 21, 2008 to ensure that all changes to CATT are completed ahead of schedule so that all outcomes files can be submitted on or before March 31, 2008.

Below is a detailed estimate for each of the 5 main areas of the project.

System Evaluation	\$ 2,000
Prerequisite Assistance	1,500
Outcomes Conversion	10,000
Additional Enhancements	1,000
Documentation and Training	<u>500</u>
Total	\$14,000

The total fee for this project is \$14,000. \$6,000 is due on the project start date and the remainder is due upon successful completion of the project. This fee represents a discounted, non-profit rate that is given specifically to Centerpoint based upon the size of the project and in recognition of our long-term relationship with each other.

INDEPENDENT CONTRACTOR

Steve understands that he is being hired by Centerpoint Health as an independent contractor and certifies that he is carrying unemployment insurance and worker's compensation. Steve does not carry liability insurance.

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ACCEPTANCE

Please sign below to indicate your acceptance of the scope of work and terms of this project.

Client Signature

Date

Steve Duff

Date