

# I&R/A Information Technology Systems: Findings from State Aging and Disability Agencies



## Executive Summary

Information technology and management information systems are key tools that aging and disability agencies use in their day-to-day work to provide services to individuals, though the types of systems and their functionality can vary within and across agencies. This issue brief explores software systems that state aging and disability agencies use for resource databases and for client tracking, case management, and reporting. Data and findings are drawn from ADvancing States' 2018 National Survey of Aging and Disability Information & Referral/Assistance (I&R/A) Agencies.

## Background and Methodology

In 2018, the National I&R Support Center at ADvancing States (formerly NASUAD), in partnership with the National Council on Independent Living (NCIL), conducted a national survey to assess the state of I&R/A systems serving older adults, persons with disabilities, and caregivers. The results from the survey highlight trends and developments in the provision of I&R/A services on a range of key topics such as services and referrals, training and quality assurance, sustainability, and technology<sup>1</sup>.

A web-based survey instrument was used to collect survey responses. The I&R Support Center at ADvancing States and NCIL distributed the survey through several dissemination channels. The survey was distributed to ADvancing States' state members, who were requested to forward it to the I&R/A lead staff at their agencies, as well as to agencies within their networks, such as Area Agencies on Aging (AAAs) and Aging and Disability Resource Centers (ADRCs). The I&R Support Center also disseminated the survey through its email distribution list comprised of over 1,900 aging and disability I&R/A professionals in national, state, and local agencies across the country. Additionally, the I&R Support Center disseminated the survey through the Alliance of Information and Referral Systems (AIRS) Networker, which reaches close to 7,000 I&R professionals. NCIL distributed the survey to its Centers for Independent Living (CILs) distribution list comprised of CILs across the country. The survey was in the field in April 2018 with follow up data gathered in May 2018.

A total of 355 respondents completed this survey, including representatives from Area Agencies on Aging (AAAs) (131 respondents), Centers for Independent Living (CILs) (93 respondents), other non-profits organizations (56 respondents), state agencies on aging and disability (39 respondents), and Aging and Disability Resource Centers (ADRCs) (36 respondents). While respondents could only select one agency type for their organization, some respondents likely work in organizations that include

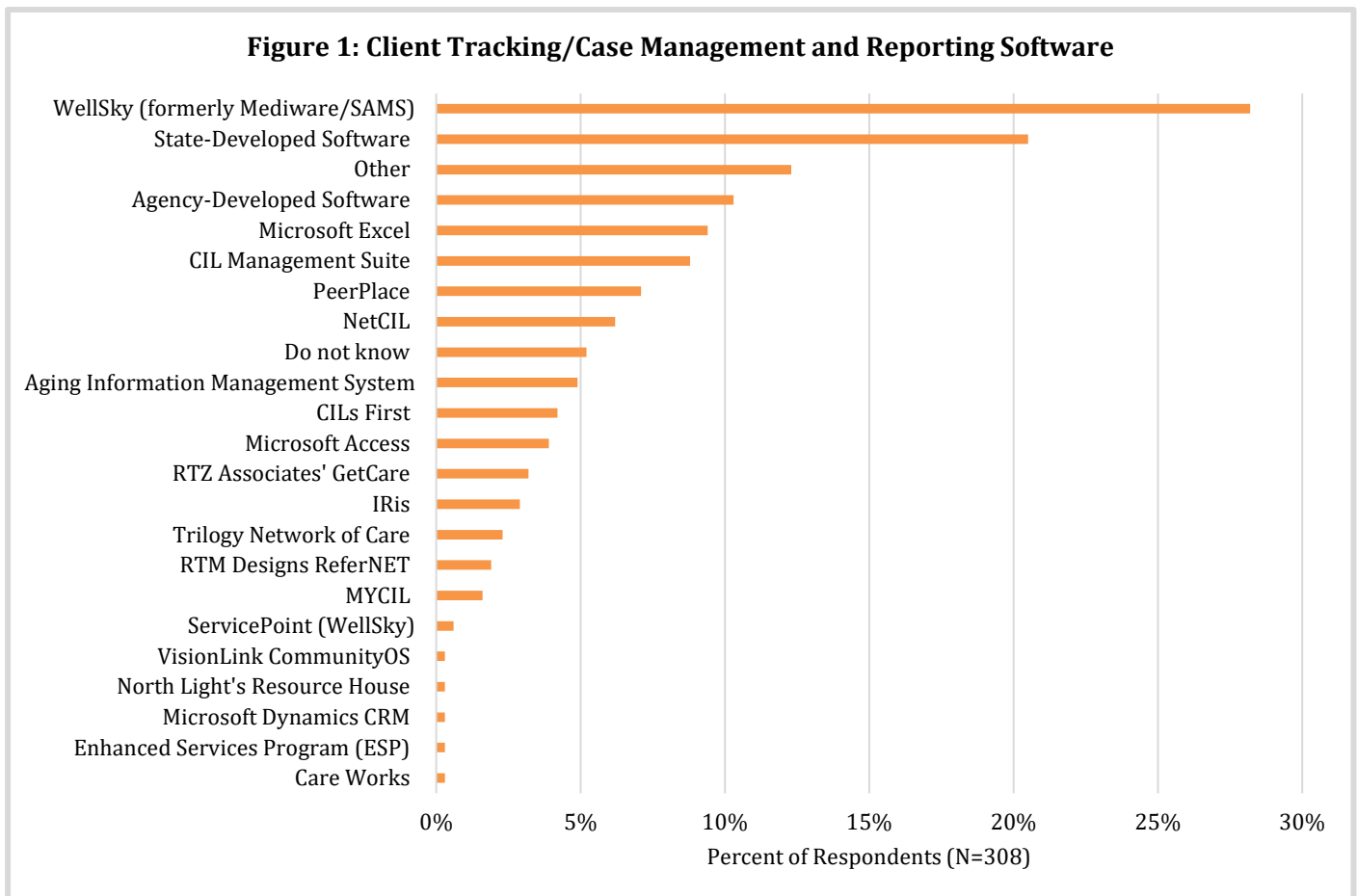
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<sup>1</sup> For full findings from the survey, see the report *Complex Needs and Growing Roles: The Changing Nature of Information and Referral/Assistance* available at <http://www.advancingstates.org/hcbs/article/complex-needs-and-growing-roles-changing-nature-information-and-referralassistance>.

more than one type of agency. This issue brief highlights responses from state agencies on aging and disability, though in some instances, data from all survey respondents is shared for comparison purposes.

### Client Tracking, Case Management, and Reporting Software

Client tracking, case management, and reporting software is used to monitor the services and supports that consumers access. In some I&R/A agencies, this software is the same or similar to the software used for the agency’s resource database, while other agencies have separate software for separate functions.<sup>2</sup> Aging and disability I&R/A agencies use a variety of software products for client tracking, case management, and reporting functions (as shown in Figure 1). Amongst survey respondents overall, agencies were more likely to report that their agency uses WellSky (formerly Mediarware) products (reported by 28 percent of respondents) or state-developed software (reported by 21 percent of respondents).<sup>3</sup>



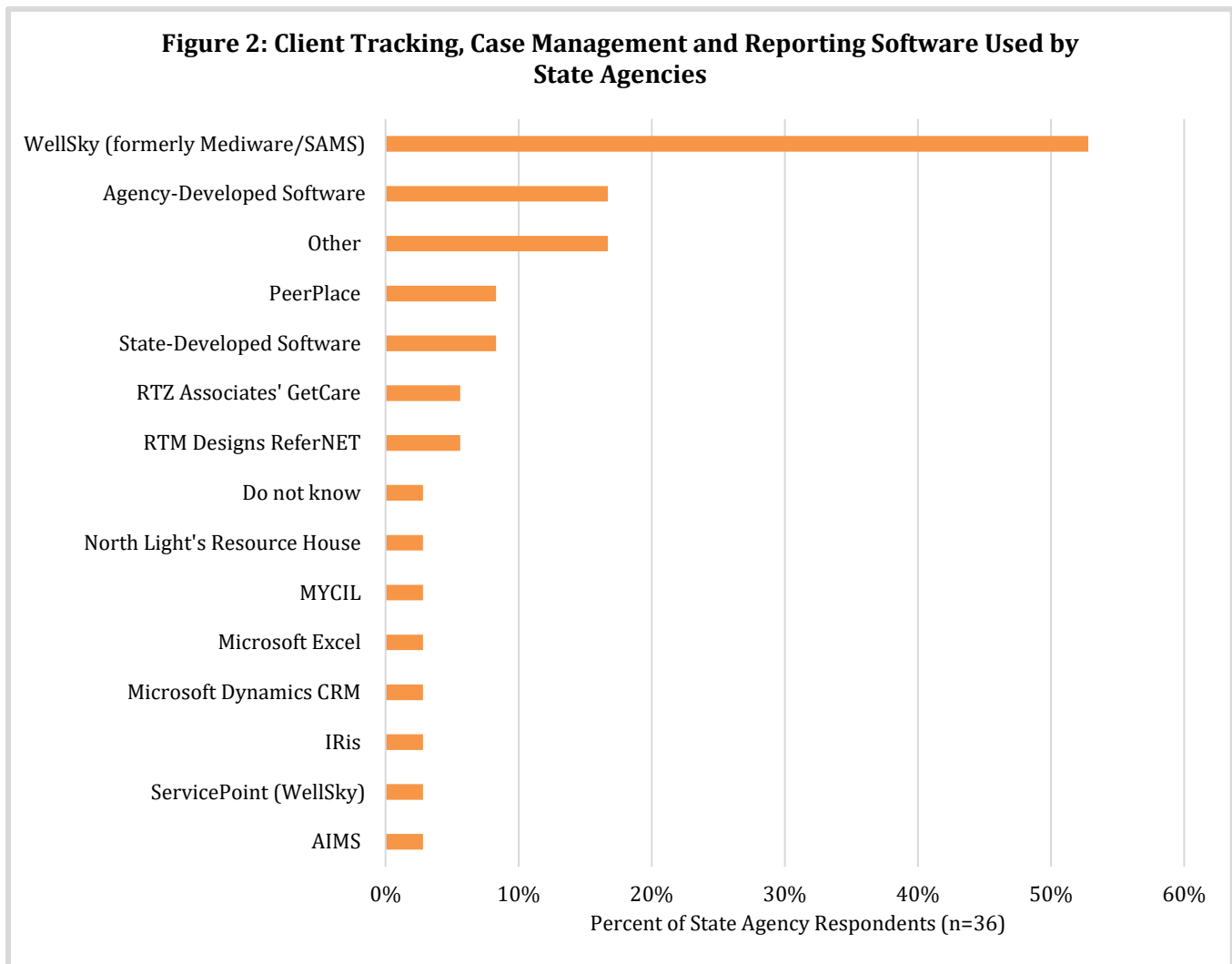
<sup>2</sup> NASUAD. The Changing Landscape of Aging and Disability Information and Referral/Assistance: 2015 Survey of Aging and Disability I&R/A Agencies. June 2016.

<http://www.nasuad.org/sites/nasuad/files/2015%20I%26RA%20Survey%20Report.pdf>

<sup>3</sup> Mediarware Information Systems, Inc. is now known as WellSky, though the name Mediarware was still in use at the time that the 2018 survey was in the field.

As shown in Figure 2, when comparing the overall responses to state agency responses, state agencies were more likely to use WellSky products (53 percent of state respondents compared to 28 percent of all respondents). Interestingly, while 21 percent of all respondents reported using state-developed software, only 8 percent of state agencies reported using state-developed software. This could be because state agency respondents may have considered state-developed software to be agency-developed software, which was reported by 17 percent of state agency respondents. State-developed software is software developed by or for a state-level agency. In addition to being used by the state agency, such software might also be used by agencies within the state’s network. Agency-developed software is software developed by or for an agency for its use, whether that agency is at a city, county, regional or other level. Additionally, 17 percent of state agencies reported that they use “other” products, including products already listed in Figure 2 (such as Aging Information Management System and Microsoft Excel) and additional products such as DXC Technology, Casenet, and FoxPro. For more detailed survey findings on the use of such software by agency type, see Appendix A. The findings overall suggest that data sharing may need to occur across different software products.

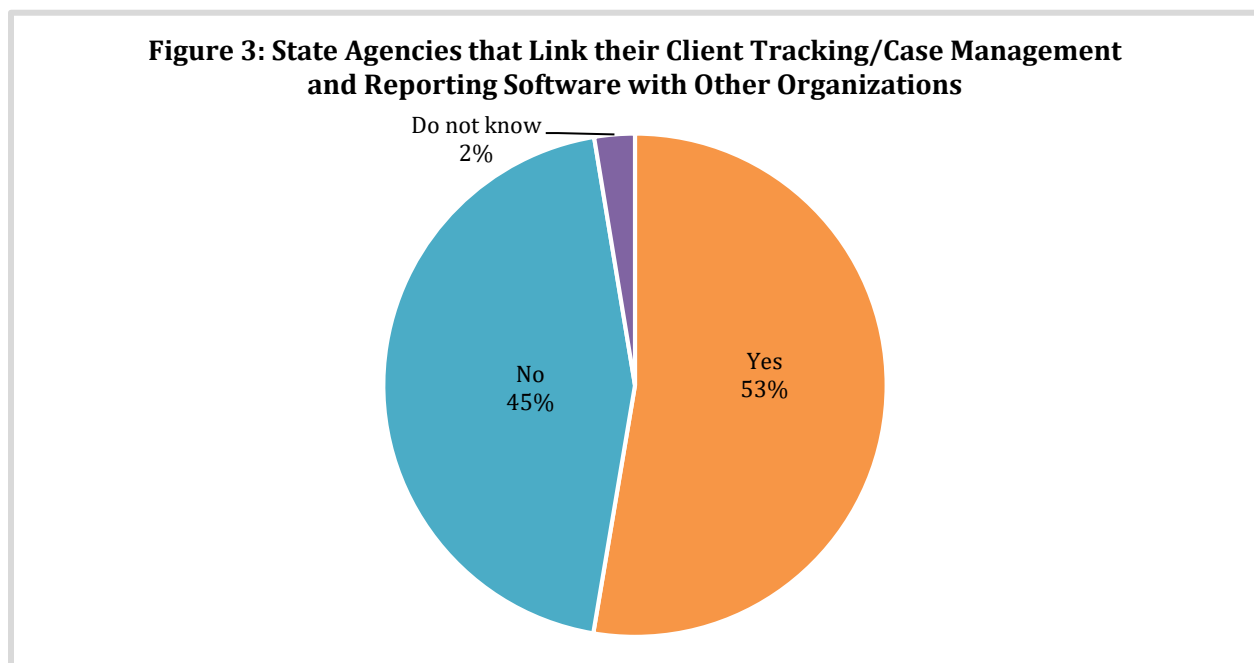
**Figure 2: Client Tracking, Case Management and Reporting Software Used by State Agencies**



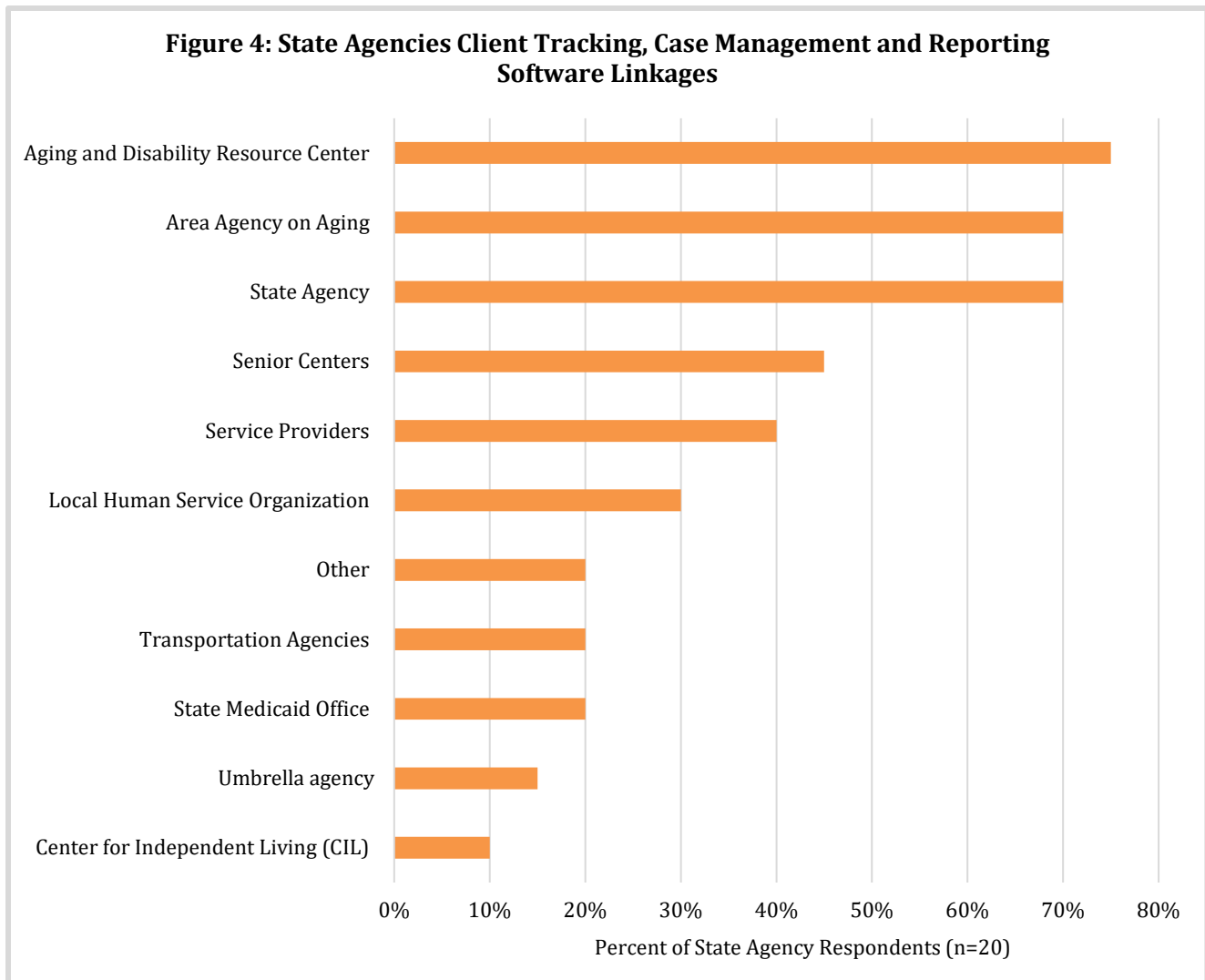
### Software Linkages

Sharing data within and across agencies may help to improve service delivery and reduce duplication of effort. The 2018 survey asked respondents whether their agency’s client tracking, case management, and reporting software is linked with other agencies, and if so, to identify the purposes of the linkages.

Of 38 state agency respondents, 53 percent reported that their agency’s client tracking, case management, and reporting software is linked with other agencies, and 45 percent reported that this is not the case (see Figure 3). When compared to all survey respondents, more state agency respondents reported that their software is linked with other agencies (this finding was reported by 40 percent of all survey respondents and 53 percent of state agency respondents).

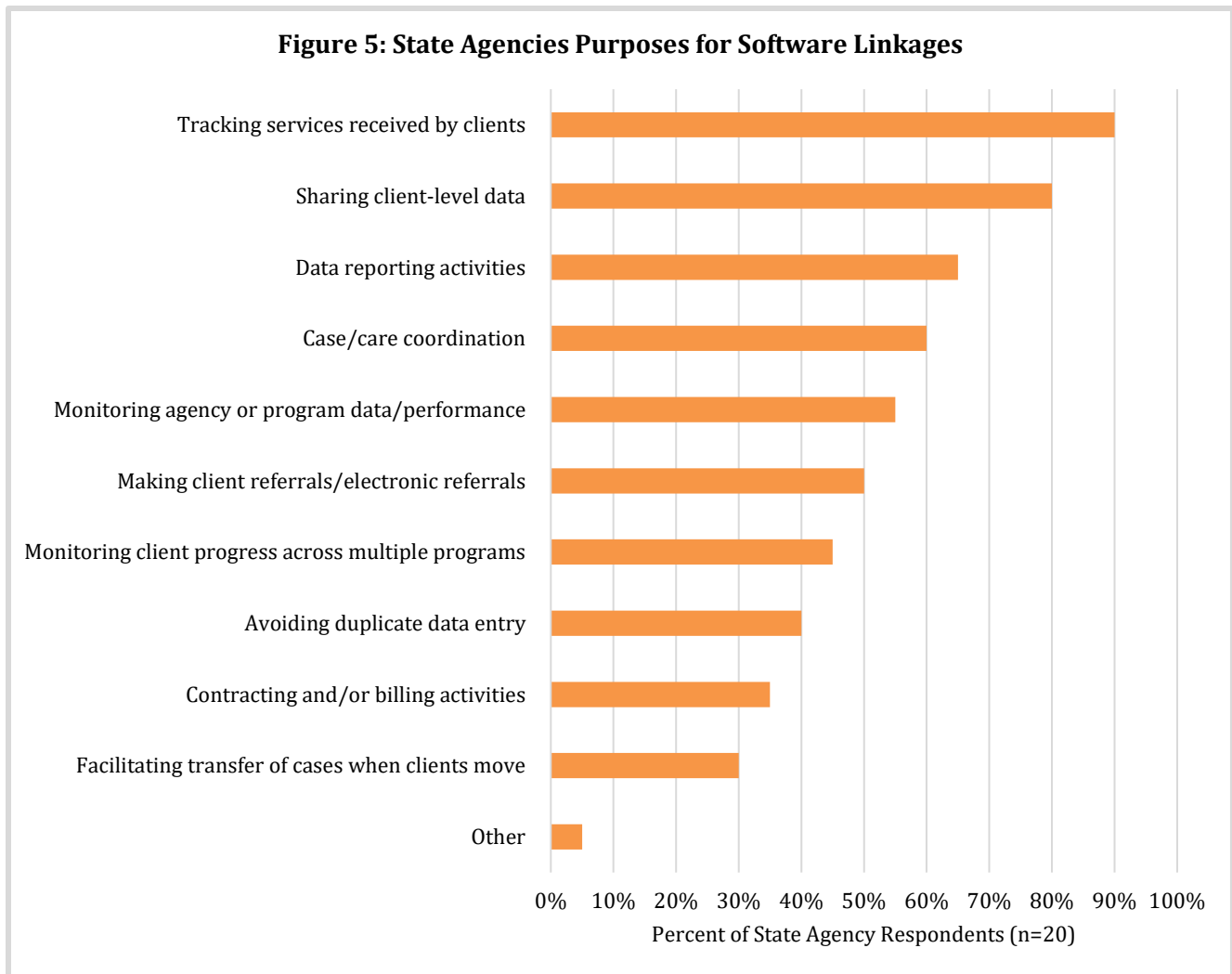


Not surprisingly, similar to all survey respondents, state agency respondents were more likely to report software linkages within rather than across networks (see Figure 4). State agencies reported software linkages most frequently with ADRCs, AAAs, and other state agencies. At the same time, only 20 percent of state agency respondents reported linkages with the state Medicaid office, though such linkages could support service delivery to shared clients.



Where software linkages with other agencies do exist, they can support key activities that enhance service delivery (see Figure 5). For example, a state agency reported that they have, “shared NWD access coordination between the state and local agencies (ADRCs) for new 1115 Medicaid programs.” Overall, state agencies report software linkages to support activities such as tracking services received by clients (90 percent), sharing client-level data (80 percent), and data reporting activities (65 percent).

**Figure 5: State Agencies Purposes for Software Linkages**

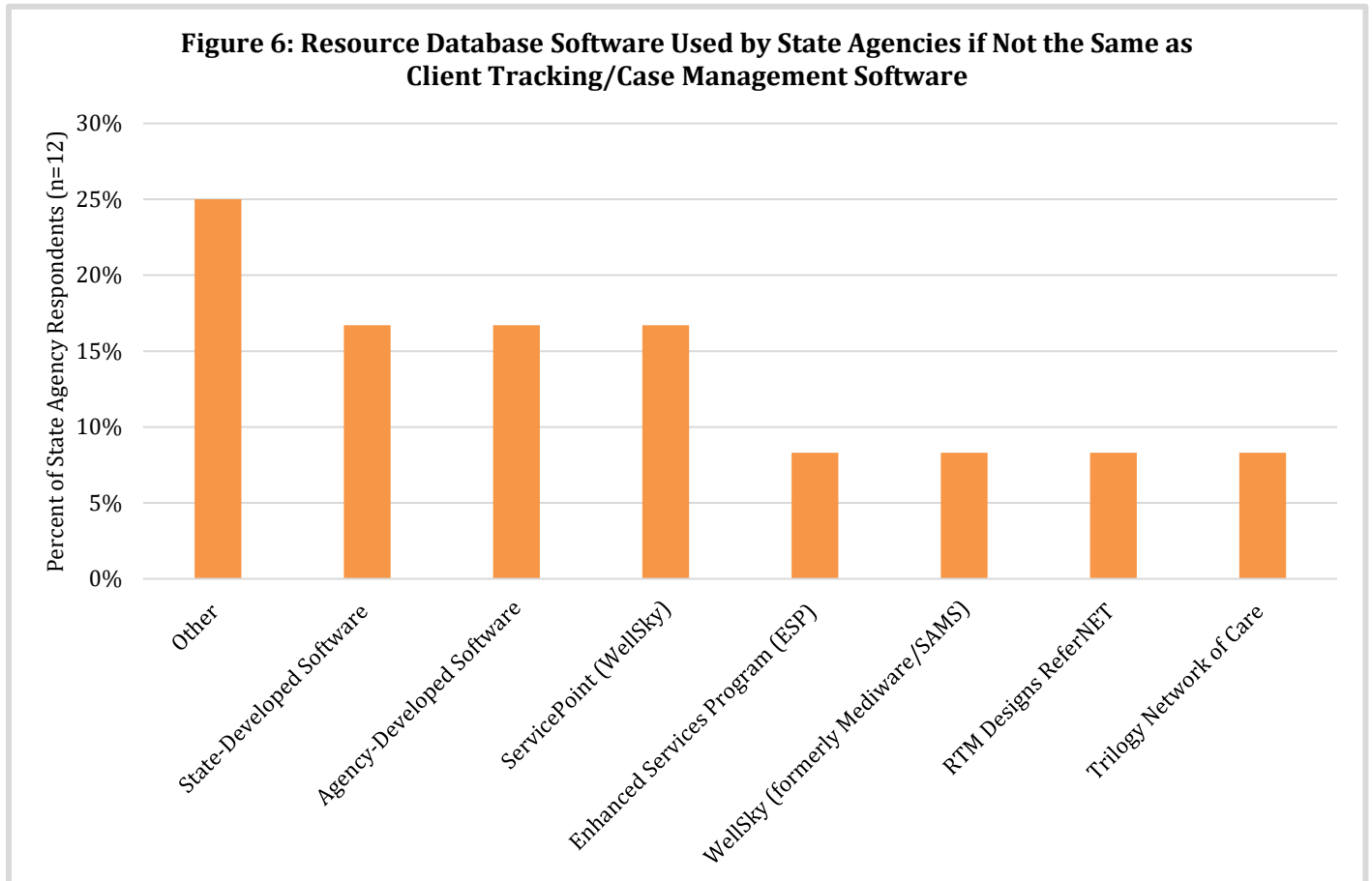


### Resource Database Software

Some agencies use the same software system for client tracking, case management, and reporting as for their resource database, while other agencies have separate software for separate functions. Of the 38 state agency respondents, 42 percent reported that their agency uses the same software for all of these functions and 42 percent reported that their agency does not use the same software system for client tracking, case management, and reporting as for its resource database. Additionally, 5 percent did not know, and 11 percent reported that their organization does not maintain an electronic resource database.

Figure 6 displays the resource database software products used by state agency respondents who reported their agency uses different software for their resource database than for client tracking, case management, and reporting. 25 percent of respondents reported “other”, this included software products already listed (such as WellSky and North Light’s Resource House) as well as additional

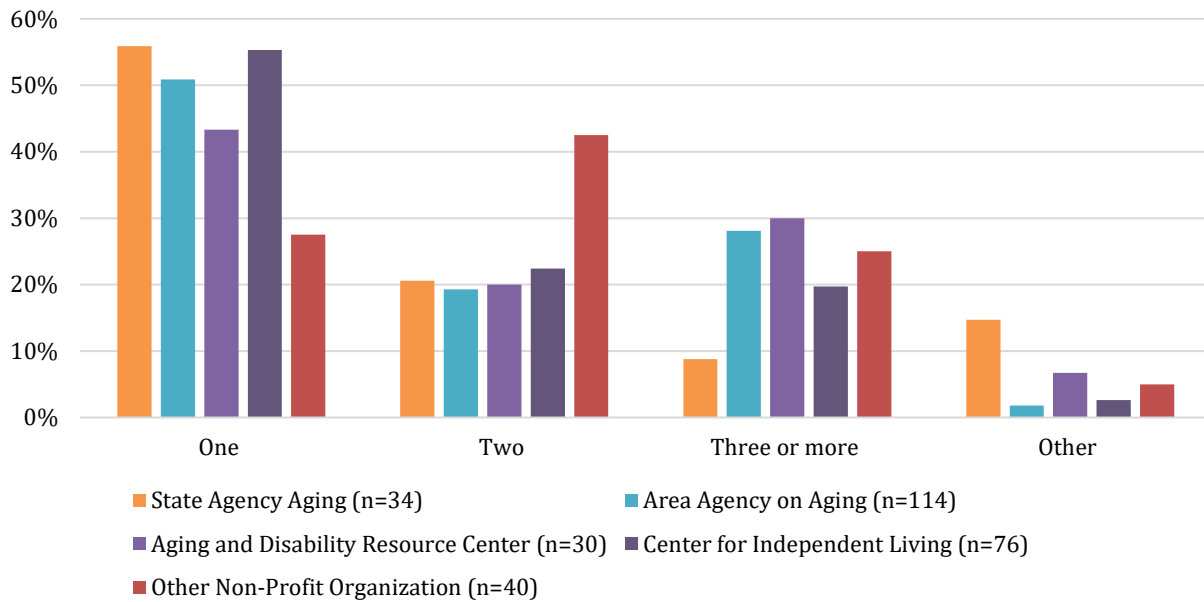
products (such as Aging Information Management System and Microsoft Dynamics CRM). An equal percentage of state agency respondents reported using state-developed software, agency-developed software, or ServicePoint (WellSky).



When asked how well their resource database software meets their agency’s needs, of 30 state agency respondents, 47 percent said that it meets their needs, 47 percent reported that it sometimes meets their needs, and 7 percent said that it rarely meets their needs. This data suggests that over half of state agency respondents are not having their needs sufficiently met with their current resource database software.

Additionally, the use of different software for different agency functions suggests that staff may be inputting data into multiple systems. Of 34 state agency respondents, 56 percent reported that I&R/A staff input data into one information system; 21 percent reported two; 15 percent reported other; and 9 percent reported three or more. “Other” responses ranged from “2-5 depending on staff roles” to “not applicable”. Figure 7 shows findings by agency type.

**Figure 7: Number of Information Systems that I&R/A Staff Input Data In by Agency Type**





### Appendix A: Client Tracking, Case Management and Reporting Software Products by Agency Type

