State and Federal mandates require compliance with reporting requirements for National Aging Program Information Systems (NAPIS) and other aging and adult services program regulations. *Harmony for Aging and Adult Services* is an Internet-based, commercial-off-the-shelf (COTS) solution delivered in a Software-as-a-Service model to meet the requirements of Iowa Department on Aging (IDA), Iowa’s Area Agencies on Aging (AAAs), and its provider community. Without *Harmony for Aging and Adult Services SAMS Case Management* software in place, compiling this reporting is time consuming, inefficient and error-prone. Accurate and timely NAPIS and other mandated reporting is essential to ensure continued funding for agency tasks and to ensure that the IDA and its provider agencies can continue to serve their clients.

Automated service tracking and reporting will result is more accurate reports, produced with less effort, and more quickly than the current methods. Delays and errors caused by manual reporting processes can result in delayed report submission and non-compliance with regulations.

IDA is already implementing *Harmony for ADRCs*, based on the *Harmony for Aging and Adult Services* *Information and Referral* module. The proposed *SAMS Case Management* solution is the only software solution that is natively integrated with the ADRC solution that will be in place. In order to give IDA a unified picture of their operations across ADRCs, AAAs, and Older Americans Act programs, any other application would require integration with the existing ADRC solution – a costly and risky prospect.

Sole source procurement will result in lower cost and faster realization of return on investment, relative to a competitive procurement such as through a Request for Proposals. IDA resources will not have to engage in requirements definition, solicitation preparation, or proposal evaluation, a lengthy and time-consuming process. If procured via sole source, the deployment project can likely be completed prior to the end of the calendar year. A competitive solicitation would likely stretch well into 2017.

IDA is also justified in procuring its solution through a sole source method because a demonstrably superior solution is available at a competitive cost. Mediware’s solution has been selected through competitive solicitations in a number of states and large localities. Mediware’s solution has also been procured via sole source in several other states in the past five years.

Mediware products are used by 28 State agencies on aging, as well as the U.S. Administration for Community Living (ACL), and more than 330 local Area Agencies on Aging (AAAs) for their annual NAPIS reporting. Mediware’s (then Synergy Software Technology) first customer was the Vermont Agency of Human Services, Department of Disabilities, Aging, and Independent Living (DAIL). DAIL partnered with Mediware 20 years ago to develop software that would allow DAIL to automate their National Aging Program Information System (NAPIS) reporting. No other vendor has this length or breadth of experience with State agencies on aging and their AAA partners. Because of Mediware’s success, the Administration for Community Living (ACL), formerly the Administration on Aging (AoA), contracted with Mediware to serve as the vendor responsible for building the State Reporting Tool, or SRT, which is the mechanism every state uses today to report their NAPIS data. Because of this special relationship with ACL that is unique to Mediware, Mediware’s software is able to map the fields in our software directly to the SRT.

Mediware’s software product automatically organizes and compiles service and client information from regional AAAs to prepare statewide reporting with no manual data transfer or conversion and without introducing human error from processing and data manipulation, reducing the annual NAPIS report to a push button operation.

Because of the provider’s unique relationship with the ACL, reporting to ACL or the State is fully automated and guaranteed to be error-free when using this product. Other product features allow more efficient and timely oversight of AAA and provider activities and use of funds. Automation allows agencies to discontinue current resource-intensive manual processes and reduce the risk of data and reporting errors.

Additionally, as NAPIS reporting requirements change, Mediware’s software is built as “future-proof” against these changes. Mediware will incorporate all of the NAPIS changes into the software as part of the normal service to ensure IDA’s NAPIS reports continue to be automated and accurate.

Mediware is proposing proven solution that the state can implement quickly and easily to ensure immediate project success. All of the functionality required to manage IDA’s operations, including comprehensive NAPIS reporting at the push of a button, public-facing web-based resource searching, information and referral functionality, and ad hoc reporting, is already deployed in states and AAAs across the country in the fully integrated *Harmony for Aging* *and Adult Services* suite. Mediware’s implementation methodology is a low-risk and known process, as proven by hundreds of successful deployments. Mediware is the only organization that has experience implementing the proposed solution, and while other implementation services organizations may be able to implement the solution, there are none trained to do so, which would introduce risk and delays.

As members of the Mediware National Users Group, the IDA will be invited to attend Mediware’s National Users Group conference. Each year, hundreds of people participate in the conference to share best practices and attend sessions focused on issues important to the aging network, including successful NAPIS management and compliance.

The proposed *Harmony for Aging and Adult Services* solution includes a number of fully integrated modules to meet the IDA’s business and functional requirements. Mediware’s modular approach ensures that the IDA has only the components needed to conduct their business, and may add additional functionality as needed. The following modules are included in the proposed solution:

* *SAMS Case Management*, the core module of the solution managing information about consumers, caregivers, programs, service planning, service delivery., and much more
* *Assessments* manages consumer assessment and reassessment data
* *Assessment Designer*, allows the State to create custom assessment instruments
* *Mobile Assessments*, allows users in the field to perform assessments and upload them when they are able to connect to the system
* *Harmony Advanced Reporting*, business intelligence and ad hoc reporting solution

The proposed *Harmony for Aging and Adult Services* *SAMS Case Management* offers features designed specifically to enable state units on aging and AAAs to plan, track, manage, and invoice for services delivered to its consumers.

Key aspects include:

* **Automatic Alerts—**Dashboards will automatically alert users to overdue, upcoming, and incoming tasks and activities, giving care managers control of their caseloads.
* **Assessments—**Assessment forms are available to case workers to assess and reassess client needs. The forms reside in the consumer record and can be completed during home visits.
* **Case Management—**advanced features provide detailed service planning and budgeting, real-time monitoring of service deliveries and outcomes, and time-saving automation of the reassessment process.
* **Care Planning, Service Authorization, and Service Delivery—**Care planning and case management tools allow care managers to record diagnoses and overall goals, plan and authorize a consumer’s complete schedule of services, and record service delivery. Case notes and activities allow case managers to manage consumers more efficiently, while the solution’s bulk data entry tool allows for home-delivered services to be recorded swiftly, accurately, and efficiently.
* **Activities and Referrals—**Staff members are able to assign referral follow-ups, consumer visits, and other service activities.  Activities and referrals can be shared among staff workers, allowing unprecedented communication within the organization.
* **Multi-Program Support—**Track multiple OAA programs and funding sources to reduce administrative overhead and increase reimbursement rates.
* **Communication and Collaboration—**SAMS’ integrated global consumer record model promotes streamlined communication and collaboration among workers.

*Harmony for Aging and Adult Services* supports the full lifecycle of consumer interaction, beginning with the initial client contacts, whether by phone or over the web, and proceeding through the successive phases of screening and assessment, care planning, service order and delivery, reassessment, and reporting. The proposed Mediware solution provides a comprehensive system for the State to manage and track LTSS, including Older Americans Act services, and efficiently complete NAPIS reporting.

Mediware is the sole provider of this software, and its unique relationship with ACL and numerous state units on aging justify its procurement via sole source methods.