Robeson County DSS Gains Efficiency with Less Paper

The Robeson County Department of Social Services (RCDSS) serves the 128,000 residents of North Carolina's largest county by area. Though the population of the county is smaller than many in the state, the agency is a bustling place. Per-capita income in the county comes in at more than $10,000 below the national average, and nearly 30% of county residents live at or below the nation's poverty line (U.S. average: 13.2%), which keeps the agency's 347 staff members busy serving as the safety net for county's populace.

Project Outcomes:

- FNS Application time cut 66%
- Processing time trimmed by 8 days
- Paper use down 25 to 30%
- First 100% score on North Carolina Health Choice report card for the county

Robeson County Facts

Formed in 1787 from part of Bladen County, its neighbor to the east, Robeson County was named in honor of Colonel Thomas Robeson who helped defeat the Tories at the Battle of Elizabethtown during the Revolutionary War.

Over 68% of the population of Robeson County are Native American, African American, or Latino, placing it among the 10% of U.S. counties where Caucasians are a minority.

Members of the Lumbee Tribe (the largest tribal nation east of the Mississippi) comprise over 35% of the county's population.

The University of North Carolina at Pembroke, a historically Native American college, is located in the county.

Going Paperless

In 2009, the Robeson County DSS was running out of space and customer service was suffering. The storage of paper case files had taken over most available space, even the staff break room had been repurposed for file storage. Even though the county had already committed to building a new home for the agency, the agency's director, Becky Morrow, knew that business as usual was not an option.

"At the time, we were looking at how much storage space it would take. We would have to build a 15,000 square foot room to house all of our records here at the DSS," said Ms. Morrow. "So it was a good time for us to look at how we could implement a program and go paperless."

In addition to addressing the pressing need for space, the agency wanted to improve client flow and key business processes to enable staff to more efficiently handle the needs of county residents. In August 2009, RCDSS launched the first phase of a sweeping agency makeover that included both client-flow and document management components developed by Northwoods Consulting Partners.

"My vision for the agency was to go paperless and to move into our new facility — hopefully we will be moving into our new facility in March of 2011 — completely paperless. Not just with our Income Maintenance programs, not just with our social work programs, but we're hoping to do that in Human Resources. Everything will go paperless," said Ms. Morrow. "And Northwoods has helped us achieve that goal. Now we have no [paper] records in the agency. We have been able to clear space where we had housed records. And everything is on the system. Northwoods has been wonderful in helping us to achieve that and to be able to go into our building without paper records."

30 Minutes Is Too Long

Prior to the Northwoods project, the agency used a system that notified everyone in a department when a client arrived, rather than individually. Some clients were left waiting for long periods of time. Supervisors could see when a client clocked in, and when a worker clocked in with a client, but the system did not track average wait times or intervene when clients were waiting too long.

"Depending on the program that someone came in for, we have seen them wait several hours to be seen," said Myra Howell, Processing Assistant, Front Desk, RCDSS.

To address the situation, North-woods installed its Compass Appointments software, which provides automated round-robin scheduling, staff availability tracking, and much more. Appointments prevents clients from becoming "lost in the system" by tracking their progress through the agency and alerting supervisors when wait times exceed the agency-determined maximum. It shortens the time clients must spend in the agency by automatically finding available workers.

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Now, when a client with an appointment checks-in at the front desk, a worker simply enters the client's social security number or other key identifier to locate the appointment. He or she then notifies the case manager of record with a single mouse click. If the case manager does not start the appointment within 30 minutes of its scheduled time, the system notifies the appropriate supervisor so that he or she can see that the client is seen in a timely manner.

"One thing I like about Appointments is the escalations," said Mary Grant, Family Medicaid Supervisor. "When I receive an escalation on a worker, the client has been waiting 30 minutes. And I get that 30 minutes is too long for a client

to be waiting on a case worker, unless everyone has somebody. My main goal is to serve the citizens of the county. I'm a single parent. Perhaps we have a single mother downstairs that has taken time off her job to come out here. I'm on my job. I don't want a worker to say, 'it's no skin off my back that client waiting 30 minutes to an hour.' In reality, that client could be losing an hour's pay. So, Appointments' escalations have really helped me as far as organizing my unit and getting them client-oriented."

■ Robeson County

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Appointments helps track when clients drop off documents or stop in to ask a question. Front desk staff can easily see if a case worker is available rather than having to locate them manually.

"Before we had Northwoods, we would sign people in to see a worker on a reception log," said Ms. Howell. "We took paperwork and signed it in to the workers, and put that they left paperwork only. If the workers weren't here, we had to find out by phoning them or paging them. Now if the workers aren't here, it shows up [in Appointments] that they're off. It makes it a lot simpler for us to find a worker."

Supervisors also appreciate the reports that Appointments generates.

"I can pull reports, pull what I need to see, what information I'm looking for. I can do it per individual or for part of a group," said Ms. Grant. "I have several types of things that I look for. I look at the number of mailings we're getting, the number of walk-ins, the number of actual intakes, inquiries… things like that. So if I'm told to find something I can customize it to what I want in just, I'd say, a minute. Now whereas prior to this, let me tell you where I was at in the paper world. I would have to go back and just count, physically count, or pull out a paper and calculate, calculate,

calculate… and it would take me an hour or two. So that is very much of an improvement."

The (Paper) Records Are Gone

"We used to have storage rooms full of folders, file after file after file," said Tracy McCormick, Child Protective Services Intake Supervisor. "Now the workers have all their information right there at their fingertips. No paper, no file cabinet, a lot of space left over. Now we get our break room back because we don't have case files in there anymore."

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Before the Northwoods project began, like many agencies, RCDSS was drowning in a sea of paper. Case managers had as many as 800-900 case files in their offices, a few of which weighed as much as 10 pounds. In addition, file storage had taken over the break room, and in some offices, it was piled high enough to create something of a safety concern.

"And staff are able to do their work now and have space to move around," said Ms. Morrow. "We don't have to worry about records falling on clients, falling on case workers, because the records are gone."

A Dramatic Change

Aside from the space savings, the RCDSS staff is finding that the Northwoods solution is saving valuable time on the tasks they perform every day. The Northwoods solution includes Compass Forms, Compass Capture, Compass Tasks, and Compass Pilot. Forms provides electronic forms automation. Prior to Northwoods, the agency was filling out forms by hand. Capture provides easy to use, point of contact scanning for capturing all documents received, whether they arrive with the client or through the mail. Compass Tasks streamlines workflow and allows business processes to be managed online. Finally, Compass Pilot provides a single interface to accomplish the majority of a case manager's typical duties.

"The scanning of the documentation is very simple, very easy," said Regina Davis, Child Support. "Being able to ma-

neuver in the system is very simple. Once you get in it and start working in it, you can just about figure the things out. It's very quick."

Northwoods' Compass Software saves time and effort in a lot of little ways that really add up. Instead of filling out a form by hand, field by field, a case worker can now look up the client in the People section of Compass Pilot and use known information (stored in a database or added by the caseworker at the time of the application) to populate many fields in a typical form with just the click of a mouse button. Rather than walking to a file room or another case manager's office, a case manager can pull up a client's case electronically without ever leaving their desk. A second here and there amounts to big time savings over the course of a day.

"They are finding out that, for example, when taking an application for the Food and Nutrition program, whereas it may have been taking 30 minutes, it takes them 10 minutes now to process and take that application," said Ms. Morrow.

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The new system is not only helping case managers do their job more efficiently and quickly; it is also helping the entire agency improve the numbers it measures its performance with.

"I see a dramatic increase in our timeliness as well as our average processing time," said Ms. Grant. "Six months ago our average processing time was around 33 days per case and now it's down to 25. So that's a dramatic change that is well worth implementing this system. So, I see an improvement on a lot of levels."

100% on the Report Card

Another key area where Northwoods can help an agency improve its performance is in meeting State and Federal guidelines.

"North Carolina Health Choice is one of our programs that we did have a tremendous amount of trouble passing," said Ms. Grant. "But for the months of February and March we passed with 100% on the report card, so that was a plus. And as for the other MAF and Medicaid for Infants and Chil-

dren and those programs, we've increased those areas as well, but we're not making 100% on those. The numbers are so large in those areas that it's almost impossible to make 100%, but we are running 97-98% in average processing."

Saving Trees

RCDSS is seeing green, in more ways than one. Where the agency once had to purchase 500 cases of paper every six weeks on average, at a typical cost of $31 a case, the use of paper has plummeted 25 to 30 percent already, and the agency expects to cut out even more in the future. Combined with the costs of toner, these savings can add up fast. Saving on paper also looks good for the environment.

"In terms of saving paper, there's very little that we give to the client, anymore," said Mary Middlesworth, FNS Intake Worker. "And as far as us having copies of the paper, it's nonexistent. Everything is in the computer. Forms are in the computer. I only give the clients the ones that have to be returned back to me. So it's saving a lot of paper. Not having to go to the copier to make copies. We are saving trees!"

It's Really a Trainer Itself

Another benefit that RCDSS is finding with their new system is that case managers and other new staff are able to learn the ropes and become productive in a shorter period than before. With its Forms Group feature, Compass Forms launches all of the necessary forms for a given program with a single click. New workers do not need to memorize the forms they need to open. This feature alone can take weeks off the training period.

"Prior to using Northwoods, the time it takes to get a new worker up and running, seeing clients, was slow… it was really tough," said Ms. Grant. "That really drained me on a daily basis… Since we've implemented Northwoods… it gives you everything you need to work with for this particular client. You tell it what you need [to do] and it puts the forms up there for you to complete. It's really a trainer itself."

The Way to Go

Adopting the Northwoods document management and client-flow solution has meant a lot of change for employees at RCDSS. Though there was initial doubt and anxiety among the staff, the vast majority now like the system and what it can do for them. As they become more familiar with the solution, they find that they can do their work faster than ever before. From mailroom to case workers to administration, the solution is improving service and morale at the agency.

"I would tell anyone that this program is excellent," said Farrah Smith, Office Support Worker. "It is 100% efficient. And they should try it."

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One thing that the employees now like to joke about is that they have to find new ways of getting exercise since they rarely need to leave their desks. They can instantly find any documents that were given to another worker for another program with just a few keystrokes rather than having to track down files in other case workers' offices or the file room.

"Now it doesn't matter who's got information on anybody in the agency," said Ms. Middlesworth. "I can pull it up just by putting their social into Compass Pilot. When I do, it pulls up in Medicaid, TANF, and Food Stamps. Everything is at my fingertips. I don't have to leave."

As the agency adjusts to the new system and workers become more skilled on their workstations and with the software, the agency expects to glean more savings from the solution. And they expect to be able to move into their new building next spring without having to move thousands of paper files.

"I have already had other counties contacting me, and I have told them this is the way to go, that Northwoods has a wonderful program," said Ms. Morrow. "They have a wonderful system and their support will be there for you in this. To sell it to your commissioners, tell them how it will save paper, how it will save workers not having to have [physical] cases. They can go in and look up cases. It also helps with the error rates in the Department of Social Services."