

Program/Initiative Title: Caseworks-Electronic Data Management System/Case File System
WDA Name: Washington County

Overview describing the innovative practice

In 2016, Washington County worked alongside Next Chapter Technology to create and implement an electronic data management system to take the place of all physical case files for programs administered at the Workforce Center as well as create a means for electronic case management. This paperless case file management system was rolled out in July of 2016, and Employment Counselors across programs spent the first initial months learning the system, and beginning to build electronic case files for all customers. In 2017 the Washington County Workforce Center has completed a successful transition to a fully paperless case file management system not only in the Workforce Center, but across the Community Services division. The Workforce Center culture has adapted to a new method of service delivery to our customers not only by the Employment Counselor staff who manage the electronic data, but also the front desk staff who utilize the system with all interactions with customers (scanning in information as well as checking customers in for appointments, checking the availability of workers etc.). The introduction of Caseworks into our workplace culture has demonstrated Washington County's continued commitment to innovation and modernization as it continues to be on the cutting edge of service expansion for not only our customers but to provide employees a workplace environment that provides its employees with options and flexibility.

Jobseeker impact (ie: benefits, outcomes for jobseekers)

The implementation of a paperless case file system has had many benefits for the job seekers and customers for which we provide services. For instance, program participants have the ability to drop off their paperwork ie: job logs, school logs, time sheets, pay stubs, etc. at any of our 4 locations in Washington County. Any information that they wish to submit to their Employment Counselor will be scanned into Caseworks at the location of their choosing, and accessible by the counselor immediately. This allows the customer increased convenience in a large county that continues to struggle with public transportation access for those seeking services. Previously, customers were able to submit information at any of our 4 locations, however, that information might be faxed or sent via interoffice mail to the correct point of contact, creating a delay in the receipt of information. As well, it allows Employment Counselors to readily share information with a customer's Financial Worker as requested. In Washington County, we work as a large team that places a great deal of importance of consistent and quality customer service. The ability to access a customer's case file from any location and in case of the absence of an assigned ongoing worker allows customers to have their questions answered, and requests fulfilled timely as workers are able to step in to fill in for one another, review case file and customer history, and ensure client needs are met.

Employer/Community impact (ie: benefits, outcomes for non-jobseekers)

The implementation of the Caseworks electronic data management/case file system has allowed Washington County to continue on with progress to provide additional flexibilities and options for its staff. For instance, with the rollout of this system, the Workforce Center was able to provide a telework option to its Employment Counselor and Workforce Center staff for the first time, as well as a means to monitor this telework option from the management standpoint. As well, Employment Counselors are able to work remotely with the ability to access casefiles from any of our 4 locations without having to transport physical case files to conduct business, or paperwork containing private information of customers. This is particularly helpful in cutting down on travel time and increasing work efficiency as counselors are able to conduct business uninterrupted from any desk within the county system. In addition, Caseworks has allowed Employment Counselors and Financial Workers to share additional information within the Caseworks system. Washington County staff identified critical documents to be shared between Employment Counselors and Financial Workers, and an interface was built to allow Employment Counselors access to specific documents filed down to a Financial Workers electronic case file. For instance, any time a customer submits pay stubs, the Employment Counselor will be able to access it using a MAXIS tab built into Caseworks specifically to share critical information as well as the ability for the Employment Counselor to copy anything directly submitted to Employment Services and send it to the Financial Worker for their records. Lastly, reduction of paper waste and cost as well as additional space

previously occupied by file cabinets and storage is a huge benefit of our electronic data management system. Using a feature in Caseworks called Print2Caseworks Employment Counselors are able to send information directly into the customer's case file. In the past, two copies of all documents were printed. One for the physical file, and one for the customer to be mailed. Currently, we are saving information directly into Caseworks, and printing only information that goes out to the customer. The savings on both money and resources with this feature are invaluable.

Identification of those involved, including collaborators

The Caseworks project management team comprised of Community Services Deputy Director (Michelle Kemper), Workforce Center Division Manager (Robert Crawford), Workforce Center Supervisor (Tina Simonson), Senior Office Supervisor (Michelle Schoeder), Senior Employment Counselors (Angela Seidling and Karen Ritter), Employment Counselors (Tina Dudzinski and Angela Plumbo), and support from Community Services Director (Dan Papin, retired) as well as Washington County's IT Department. The Caseworks system was built for the Workforce Center by software company, Next Chapter Technology. Next Chapter Technology continues to provide ongoing technical support to the Workforce Center to troubleshoot technical issues as well as complete updates to forms directories and improvements as issues are identified.

Leveraging/alignment of outside resources

The introduction of Caseworks has influenced our workplace culture in a way that has allowed us to take both strengths from the system as well as strengths from staff to continue to see a positive and successful return. The Workforce Center has seen staff commit to learning a new system, leaders in usage and best practices have emerged as well the ability to operate without an increase in the consumption of resources. The funds spent for the initial system build are seen in return daily with the decrease of paper and storage systems needed within the Workforce Center system, as well as the return in overall worker efficiency and time management.

Ideas for replication/lessons learned

Washington County's project management team and Next Chapter Technology placed a great deal of importance on planning and preparation for the transition to the Caseworks system. Emphasis was placed on building a strong and comprehensive Business Process Document that provided a guide to all staff on the Caseworks system on how to deal with all day to day scenarios including handling walk ins, scheduling appointments to Caseworks, referrals of new participants, dealing with physical mail, faxes, emails, managing an electronic document mailbox, closing cases and reopening cases. The project management team also spent a great deal of time thoroughly prepping our existing files for a transition to Caseworks so that all existing files scanned into the system would be clean and clear of any unnecessary documentation, and an accurate representation of how all electronic files would be structured moving forward. Spending time on these critical preparation pieces allowed for staff to learn the system thoroughly and provides consistency within all electronic case files, regardless of program enrollment. It was also ideal to have not only management staff on the project management team, but to have Employment Counselor representation at the beginning stages of design. This ensured that each program's needs were met with the input of "on the ground" staff's input, and compromises were made along the way.