



The Role of Modern Technology in Human Services Delivery

How cloud-based case management can help staff work more effectively from anywhere

Legacy Agency Systems Can't Serve New Demands

The economic disruptions of the COVID-19 pandemic have dramatically increased demand in human services agencies, and this is unlikely to decrease anytime soon. But outdated technology often hinders agencies' ability to respond quickly, efficiently and effectively.

Many agencies still rely on aging systems to manage information and activity for cases and other core functions. The limitations of these systems have become burdensome for agencies and staff.

For example, the pandemic heightened the need to support work from anywhere — the office, an employee's home, a client's home or on a mobile device in a field location. Yet a legacy system may not adequately support remote work, creating delays and reducing productivity when staff must return to an office or use a laptop to access and enter critical information.

And when information is siloed across multiple systems, it's difficult for agency staff and leaders to obtain a complete picture of needs, resources and services. Caseworkers in particular need easy access to all information about a client's history, as well as current resources, assessments and services.

What's Needed for Case Management Today

An up-to-date case management system is vital to help agencies deliver high levels of

complex client and community services. This system design must address several critical needs for agency work.

Mobile device support. Especially when away from the office, staff need to access information, enter data, and receive real-time notifications and alerts.

Digital forms and documents. Along with electronic signatures, digital forms and documents are increasingly the norm across business and personal activities. These online capabilities are essential for an agency to implement paperless processes and automated workflows.

Centralized data repository. Agencies need a single place to store all data and documents for consolidated information access and reporting. A central data repository is also needed to support knowledge sharing and collaboration by all staff involved with a client or case.

Easy adaptability. To meet demand, agencies may need to bring in temporary staff or recruit more volunteers. An agency needs the ability to configure these workers as system users (with appropriate privileges) and adjust user numbers monthly to reflect personnel changes.

Controllable costs. Given budget constraints, any new system must offer predictable costs.

How New Technology Can Help

Government agencies of all types are choosing cloud-based software-as-a-service (SaaS) solutions to replace legacy systems.

A cloud-based case management system provides a platform to adopt new technologies, scalability to match demand growth for an agency's services and flexibility for changes in the employee base.

SaaS solutions for case management, which are developed and maintained by the vendor, can bring several benefits to agency services, operations and budgets.

A modern system is designed to fully support caseworkers wherever they work, on mobile devices that are convenient for the employee and affordable for the agency. A case management system with a browser-based design also offers a consistent experience for users, whether working on a laptop or mobile device.

The ability to enter data from a laptop or mobile device can improve the timeliness, completeness and accuracy of client information. In turn, a case manager can make a better assessment of client needs and more informed decisions about community resources and service delivery. All staff who work with clients or service providers can increase their productivity by using tools to collaborate with everyone involved in a case.

Storing electronic forms and documents in the cloud maintains a single data source to use for agency measurement; reports to funders, leaders and the community; and operational decision-making.

In addition, a cloud-based system can more easily keep up with an agency's changing operations. It provides a platform to adopt new technologies, scalability to match demand growth for an agency's services and flexibility for changes in the employee base.

The costs of a SaaS solution may be more affordable compared to the initial and ongoing costs of an on-premises system. A pay-as-you-go pricing model gives an agency clear and predictable budgeting, as well as the simpler procurement of a solution that's paid for from operational funds.

Better Information for Better Work

New technology can benefit an agency's specific services and the work of many agency staff.

For instance, foster care and adoption services can streamline applications, inspections and reports by using digital files sent to parents for electronic completion and signature. Youth and family services maintain a higher level of information quality when all data is entered online as it is collected in the field. Advocacy and domestic violence services can use a central data repository to see the links among related cases as well as the associated agency staff and resource providers. Inspections and licensing services can eliminate paper records, avoid duplicate information, and allow data entry and updates while on site.

Reaching Youth in the Community

The Seaside Youth Resource Center, a one-stop referral program, focuses on a coordinated-care approach which includes social service agencies, preventative and intervention programs, and other support services to help youth and their families in crisis. Kee Hyon Higgins, activity coordinator, describes the impact of using a cloud-based case management system on the center's work.

"We needed an efficient and digital system to manage our clients, evaluate client data and grow our existing agency at all levels," he says. "Paper files required walking to our filing cabinet, pulling out the drawer and combing through folders to find what we needed. This process wasted time, money and opportunities to meet with new and existing clients."

The department had no access to files if staff were out with clients, meeting with community partners or at a school campus. This constraint severely hindered its ability to serve the community at the highest level.

Although the department previously recognized the need for a better way to manage cases, the pandemic highlighted the importance of having a digital case management system. To meet health and safety protocols, staff had to find ways to work remotely and having a digital case management system allowed this.

"We expect to see more organization and efficiency in our agency from having a cloud-based case management system. And having the ability to serve our clients anywhere is a huge advantage for our team," says Higgins.

Staff and volunteers who interact with clients or service providers will benefit from easier access to the right forms and information, especially when working in the field. Agency leaders can improve planning and decision-making with consolidated, current information on agency operations, demand levels and trends.

Preparing for a Successful Transition

The following steps will ease the transition to a new case management system, both for the technical implementation and changes in an agency's operational processes.

- ✓ Review data for needed cleanup before importing it into the new system.
- ✓ Evaluate forms for needed changes, especially if they will be digitized for the first time.

- ✓ Document business processes and create checklists that can be automated to help with service compliance and consistency.
- ✓ Educate staff about the coming technology and process changes before implementation begins.
- ✓ Offer periodic staff training to gradually expand system use and increase its value.

Empowering an Agency to Do More

Modern technology is critical to empower human services agencies to do more, especially in times of disruptive crisis and high need. With a new case management system, an agency can maximize efficiency, keep pace with growing service needs, and deliver timely, effective assistance to clients and the community.

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