

OVERVIEW: The Solano County Department of Health and Social Services, in partnership with Information Technology, created a paperless work processing electronic management system for the County IHSS program.

CHALLENGE: The Solano County Department of Health & Social Services, In-Home Supportive Services (IHSS) has traditionally retained records using paper case files, a system of content management that has not changed in decades. The system was redundant, time consuming, labor intensive and exceedingly inefficient. With an increasing emphasis on mobile clients, employees and workspaces, the ability to access files electronically had become a necessity rather than a convenience. The existing system of data management and storage had become increasingly bogged down with redundancies and duplication of efforts, resulting in lost productivity, a massive requirement for physical storage space, inefficient communication between clients and staff, and superfluous costs associated with human resources, paper, copier maintenance and ink cartridges. The challenge to create a repository of permanent, electronic storage of all IHSS case records became the new goal, and the prospect of using technology appeared to be the innovative solution.

INNOVATIVE SOLUTION: To address this challenge, Solano County IHSS partnered with the Solano County Department of Information Technology (DoIT) to work with a vendor to develop work processes designed to eliminate redundancies and increase efficiencies in the migration from a paper based to electronic based system. The solution included implementing the Transformation of Content Management Program (or TACOMA) electronic file maintenance software (Documentum; more specifically, the Application Xtender) throughout the County IHSS platforms. The TACOMA solution stores and indexes all files by case number and document type for easy access and retrieval. Files are also managed and maintained per County and State mandated retention policies.

ORIGINALITY: There are other counties using electronic document storage software, however, Solano County IHSS is the only known county to date to have end-to-end paperless work processes.

COST EFFECTIVENESS: The implementation of the transformation of content management system has resulted in an immediate cost savings for the County as well as projected long-term cost savings. Over the next four years – at full-implementation status – the program is anticipated to save the equivalent of 3.4 full-time employees (FTEs) worth of worktime, or 5,610 hours annually. For context, a single FTE is equivalent to 1,650 hours of worktime.

RESULTS: The implementation of the Transformation of Management Project (TACOMA) has resulted in an improved process and experience for everyone involved, including County staff who create and perform IHSS intakes, assessments and reassessments and their IHSS clients.

CSAC 2018 Challenge Award Entry – Solano County – the Transformation of Content Management (TACOMA)

County employees: The use of technology, including wireless hardware and tablet devices, has achieved an automated, paperless process for IHSS case records. By implementing a driver form, all other forms with redundant information are auto-filled. Once the forms have been electronically processed, they are automatically directed to the document management system for permanent case storage. The TACOMA electronic system also allows County workers to autofill referrals to the Public Authority, Mental Health Clinicians, Fraud Referrals, and Public Health Nurses. System-generated referrals are automatically sent to the inbox of the intended recipient.

Along with electronic forms, the Department of Health and Social Services, IHSS created a multi-page Case Narrative form, using the Quality Assurance (QA) Case Narrative Guide, consisting of check boxes and drop-down menus, all which require minimal typing to retrieve. Once the form is completed, the social worker can hit a "submit" button, allowing the system to email the worker a concise one-page document. This information is entered into the State's Case Management Information Payroll System (CMIPSII), allowing the social worker to complete an assessment without any guess work regarding what should be included. The Case Narrative can be used year after year, making updates on a necessary basis. This form ensures uniformity of the case narrative for ease of reviewing by supervisors and QA staff.

IHSS clients: When conducting a home visit, the social worker and the IHSS client can now focus on having a conversation, rather than filling out more than 100 forms and 2,000 individual information fields, which is now completed using an electronic auto-fill feature. The IHSS client also has increased access to their case information, which has also been significantly improved through the client interface portal, allowing them to review and sign electronic documents in real-time, streamlining the benefits process while improving social worker / client relations.

In summary, implementation of the TACOMA project has facilitated efficient communication among collaborating staff, streamlined workflow for all classifications, progressively reduce paper storage needs, and simplified access, search and organization of supplementary case documentation; all with the goal of reducing time while improving the user experience (both social workers and IHSS clients), resulting in cost savings through better use of technology.

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OPTIONAL VIDEO SUBMISSION: The Department of Health and Social Services, ODAS is planning to submit a short video to CSAC in support of the TACOMA Project award application packet.