



Application for 2009 Outstanding County Program Awards

County (if multi-county entry, list all): Randolph

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The Association encourages electronic submissions. E-mail the application and project/program description to Todd McGee at todd.mcgee@ncacc.org. You can also fax your entry to (919) 733-1065 (attn. Todd McGee), or mail it to: NCACC, 215 N. Dawson St., Raleigh, NC 27603. Applications must be postmarked by **Friday, Feb. 26, 2010**.

Projects/programs must have been implemented between Jan. 1, 2008, and Dec. 31, 2009. For additional information and category criteria, visit www.ncacc.org/awards/ocpa/about.html.

Project title: Client Management

Category (you may check more than one):

General Government Human Services Public Information/Participation

Address each of the following questions in a typed program/project summary in a separate Word document attached to this application form. Limit your responses to two pages. Use single-spaced lines and 12-point, Times New Roman font. Supporting materials may be submitted, but due to time constraints, judges may not review the materials.

1. What are the purpose, history, timeline and budget of the program/project? Will the county realize any projected cost savings? (For public information/participation programs, please try to estimate participation levels).
2. What makes the program/project unique? How does it differ from similar projects in your county or in other counties?
3. How well did the program use available resources, given the limitations on such resources?
4. Can this project be duplicated in other counties? If another county wanted to do a similar project, what advice would you give them to minimize obstacles and problems?
5. How did the project involve collaboration with other agencies, jurisdictions, nonprofits, businesses, etc.? How well did this collaboration work and is it on-going?

1. *Purpose, history, timeline, budget, projected cost savings, and participation levels.*

The *Client Management* software utilized by Randolph County Department of Social Services (DSS) began as a spin-off of a much larger county-wide document management and imaging initiative. As we began to automate forms creation and storage at the DSS office, it became painfully obvious that our DSS reception area needed help dealing with their “paperwork” as well. As clients checked in at the front desk, they were signed in on paper logs by the receptionists who had to gather addresses, dates of birth, and other demographic information, all written down by hand. Receptionists then (referring to a daily roster of available workers) tried to telephone workers at their desks to inform them that a client was waiting to see them, keeping counts of who and how many times they called. When a worker was notified and came to take a client, the receptionists tracked (again on the paper logs) which worker had taken the client, for which program area, and the disposition of the client’s visit when the worker was finished. The process began again if the client was here for more than one program. Even with our very skilled veteran receptionists, the stress level was always very high. Some clients would grow angry and frustrated by the long wait-time in our lobby, sometimes remaining unseen by a worker for hours. Workers felt that the receptionists called some workers for intakes more often than others, affecting those workers’ caseloads. Supervisors dreaded combing through the paper logs to gather statistics based on the data collected. The system had become inefficient and unmanageable.

The purpose of *Client Management* was to automate the manual record keeping done by the receptionists, allow workers to see clients in a more efficient and timely manner, and better serve our citizens. This was a collaborative project between Randolph County IT and the DSS staff, which “went live” in late June 2009.

The result is a transformation in the way the Randolph County DSS reception area does business. Clients give their name and date of birth to the receptionist, who brings them up in *Client Management*. They are checked in to see a specific worker and/or a group of workers for one or more program areas, all through an easy-to use graphical interface on the receptionist’s PC. Workers in their own offices log into the program if they are “on intake” that day, and see a list of clients waiting to be seen. They click on a client’s name to “take” the client, and enter the disposition of the visit when they “release” the client.

With an ever-increasing number of citizens coming to our office for services every day, the two receptionists are easily able to manage an increasing number of clients. The county has saved \$34,137 (the cost of hiring an additional receptionist) annually, but the real benefits, although hard to put a dollar figure on, are no less tangible and invaluable. The reception and lobby areas of DSS have become orderly and calm. Clients are checked in efficiently and called quickly by workers. Receptionists are no longer dialing repeatedly, trying to contact a worker. The agency’s overhead page usage has dropped by 95%. Even on a busy day, a client can know that they are in the “queue” and how many clients are ahead of them for the program they want to apply for. Customer satisfaction, lower stress on workers, and meaningful statistics for supervisors are all results of this program, one that Randolph County DSS has come to depend upon, and an application that has quickly become “mission critical.”

2. *Uniqueness*

What makes this piece of software so unique is its flexibility and adaptability, while maintaining the robust functionality needed to meet the needs of everyone involved. An administrator of this software can (with no programming skills) add, delete, activate, deactivate and edit new or existing “Monitor Types” (types of activities the system logs and tracks), types of programs, users, disposition codes, workflow processes, and much more. For example, the administrator can designate whether or not a worker speaks Spanish, thus letting a bilingual worker take a client needing an interpreter. If a worker is not bilingual, the system checks for the availability of an interpreter, and either assigns one as the worker takes the client, or stops the worker if none are available. Another example is, “What if a client leaves the lobby, and is not there when the worker comes to pick him up?” The worker uses the “Called, No Answer” disposition code which puts the client in a hidden holding zone within the system. If the client returns to be seen, the receptionist can put him back “in the queue” with one mouse-click.

DSS has many unique regulations dealing with how clients are offered services in the most non-discouraging manner possible. All of these policies had to be taken into account, yet the flexibility is built into the software to allow an administrator the ability to change processes and workflow if (and when) it’s needed to cope with policy changes that would affect how our clients need to be managed.

An alerting mechanism was placed in the system so that clients who may pose a danger could be flagged and security notified when the client is present in the building.

Finally, the system uses the concept of “queue appointments” to allow a client who cannot be serviced until the next day, to come in and be taken immediately by an available worker. The appointment system also allows for a user configurable “grace period” that will honor the appointment until the grace period expires, while accounting for holidays.

3. *Available Resources*

Client Management was built in-house as a Windows Forms application. It leverages the data of several existing systems. Client data (name, address, case number) is imported from our case management database. Worker status and availability is checked via a web service from our electronic in-out board software. Images from our document imaging system can be accessed to verify identity or county case number of a client. Incoming mail can be scanned directly to our document imaging system as it is logged utilizing a web service built for that purpose. Our enterprise report server is used to generate reports for the statistics and information supervisors need.

4. *Duplication*

This project could be duplicated in any other county. The database and file systems may differ, but the underlying concepts remain constant. All DSS offices have some sort of reception system. The key to a successful project such as this is the collaboration and communication between the IT staff and DSS personnel. IT staff must commit to developing an in-depth understanding of the processes they are automating. The DSS staff needs to make an analysis of their processes and communicate their needs as concisely as possible. Each side needs to listen to the needs of the other, and lay out a clear scope of the project, then stick to it. Randolph County would be available to aid other counties/agencies who may wish to implement a similar solution.

5. *Collaboration with other agencies*

No collaboration with other outside agencies or businesses was involved in this project. It was purely an in-house project. However, the program was designed with the flexibility to be able to handle client tracking for other departments within county government, or other non-government agencies.