



North Carolina DSS Agencies Save Space and Time with Compass Software®

In Yadkin and Macon counties in North Carolina, the Department of Social Services Agencies serve as safety nets for low income families and those with temporary financial setbacks. Bad economic times mean increased business at the DSS, but even in good times the agencies are kept busy. Handling the daily influx of paper documentation and forms needed to provide services to county residents is costly for agencies. Often they have to purchase offsite storage, which means both additional expense and limited or slow access to documents in storage.

Yadkin and Macon counties were already using Laserfiche, an electronic document management (EDM) solution, to scan closed cases, but storage was still an issue with more documents coming in every day. In addition, they were looking for a way to make the process easier for their caseworkers. A properly implemented EDM can increase the speed and accuracy of responses to clients while easing the burden on case managers. In addition, these systems provide instantaneous access to information and save on a variety of costs, including paper and file-storage space.

Northwoods solutions provide EDM tools for case managers, as well as schedule and client-flow management, distributed scanning, and electronic forms. Compass Software® by Northwoods is developed specifically for Human Services agencies, and the Northwoods staff has years of experience in agencies and in implementing solutions to help them run more efficiently.

Yadkin County

Eddie Wooten, Director of the Yadkin County Department of Social Services, had a problem. His agency was running short on space and needed to hire more staff to keep up with the increasing demand from the county's residents.

"We were running out of storage space for files, plus we needed to add staff and didn't have any room for them," he said.

After evaluating other solutions, Yadkin County DSS chose Northwoods because of the effectiveness of its software in other counties and the customer service provided.

"Northwoods is the most customer-friendly and easiest-to-use solution we found," said Mr. Wooten. "What swayed us to buy from Northwoods is that the feedback we received from agencies with other solutions was not nearly as positive as what we received from agencies with Northwoods."

Yadkin County DSS chose to add Compass Capture to provide distributed scanning of documents at the point of entry into the agency, Compass Forms to provide easy partially automated completion of forms electronically, and Compass Appointments to help the agency keep up with individual schedules and case manager availability. In addition, they also implemented a new product called Compass Pilot that provides a front end to the Laserfiche EDM. Pilot puts specialized searching capabilities, created specifically to meet DSS needs, in the hands of the case managers and serves as the control center where they can perform most of their daily duties.

After less than a year, the Northwoods solution is paying off in Yadkin County. Paper usage is down 50% so far, due to the elimination of the need to make copies of all forms and support documentation dropped off at the agency. Case reviews now only take about 10 minutes, down from 20–30 before Northwoods.

The addition of Northwoods-recommended dual monitors also helps the client experience.

"Now the client watches as we type and they can correct spelling and other things during the process," said Tenia Vestal, Adult Medicaid/Food Stamp Supervisor. "When it comes time to sign, the clients feel like they've already seen everything they're signing."

The Northwoods solution provides improved file availability, a drastic reduction in misplaced documents, more convenient answers for client inquiries, and a streamlined approach for information exchanges with other agencies.

"Now when we send information to other counties we just find the files in Pilot, burn them to a CD, and send them," said Tina Lineberry, Family and Children's Medicaid/Food Stamp Supervisor. "Before we had to locate the physical files, copy them, pack them, and mail them."

"If you're copying a folder to send, there are usually subfolders that have to go, too. Someone who is efficient with a computer can copy and send the files a lot faster than someone working with paper files. I did a 175-page folder in seconds. And the cost of mailing a CD is much less than the cost of mailing a 175-page folder."

The Northwoods solution is also popular with the Information Technology department that supports the system.

“We have 70 printers and have to stock three to four cartridges for each kind of printer,” said Joshua Arnder, Network Administrator. “We used to order cartridges every two to three weeks. Now I don’t think we’ve had an order in three or four months.”

“From a security standpoint, it’s much easier to implement security on an electronic file than on a file room that basically anyone can walk into. We also couldn’t easily duplicate our file room for disaster recovery. Simply copying all the paper files, moving the copies offsite, and keeping those paper copies up-to-date was cost prohibitive. Maintaining secure tape backups of the electronic database offsite is much easier and cost effective.”

Workers in different buildings can now share files through the system, which reduces errors because everyone has access to the most up-to-date information.

While some staff members saw the benefit of the solution right away, others at the DSS viewed the new system as one more hurdle in their day. But soon, they began to see that it would actually help them to do their jobs.

“Their attitude has gone from ‘Why are we doing this?’ to ‘Can it also do this for us?’” said Ms. Vestal. “Basically everything we do in Northwoods, we couldn’t do before.”

Best of all, Yadkin County now has the room that they need and are able to expand their staff.

“We no longer have a file room,” said Mr. Wooten. “We’re going to use the old file room for five additional offices and a conference room.”

Macon County

Macon County DSS began their implementation soon after Yadkin County, but they are taking a less aggressive approach to ease their employees into the new system, and it is also working. Though they are still using a fair amount of paper in the agency, they are gradually reducing it and improving service at the same time.

“I have seen a positive effect in face-to-face interviews,” said Jane Kimsey, Director Macon County DSS.

Though the DSS is still in the process of implementing some aspects of the solution, Northwoods has nevertheless had an effect throughout the agency. In Adult Medicaid and Food Stamps, case managers report that the solution is shortening interview times with clients, as they grow more accustomed to the new system. At the Front Desk, staff scan all incoming documents as they arrive, making them instantly available to the case managers throughout

the agency. Before Northwoods, all of the documents scanned into Laserfiche would go into a file for each client. The Northwoods indexing model has helped add organization and speed up retrieval, as the case managers adapt to it.

Compass Forms is proving to be very popular with the agency’s staff. With features like Quicklist, which lets individual employees keep their most used forms on a short list for easy access, and Forms Groups, which launches all of the forms needed for a specific application at one time, the Forms software saves case managers a great deal of time over the course of a day.

“Case managers are saving a lot of time being able to fill out forms and having everything in the system,” said Mrs. Kimsey. “The Quicklist is really great. When you have new staff or case managers working on programs they don’t do often, the Forms Groups really help eliminate errors. The system prevents them from forgetting a form or two.”

To help the agency employees continue to work more effectively with less reliance on paper (Ms. Kimsey expects to eliminate paper files in the summer of 2008), Northwoods employees continue to visit the agency from time to time, providing additional training and tips. Their work is getting rave reviews from agency.

“I really want to complement Northwoods customer service,” said Ms. Kimsey. “They far exceed what we’d expect, and I have high expectations. The response has been great every time we call, and the trainers have been phenomenal. Every time Northwoods visits, we learn something new.”

About Northwoods and Compass Software®

Compass Software® from Northwoods is a complete suite of applications designed to bring time savings, ease, and efficiencies to Human Services. From electronic forms and document management to client-flow and scheduling solutions, Compass Software® and Northwoods can help agencies reduce costs while providing better service to more clients.