

# LENOIR COUNTY UPGRADES ADULT AND FAMILY SERVICES WITH MOBILE APP

Lenoir County Department of Social Services' (DSS) Adult and Family Services social workers were challenged to balance meeting paperwork requirements and spending quality face-to-face time with clients because of a manual, paper-based process. Since implementing Northwoods' office- and field-based document management solutions, social workers have access to client and case information whenever and wherever they need it to provide clients more holistic, quality service.

## PROJECT HIGHLIGHTS

- Electronically view and collect documents on home visits
- Save 1-2 hours on paperwork per day, per worker
- Improve supervisor visibility into operations



## PAPERWORK CHALLENGES LIMIT TIME WITH CLIENTS

Lenoir County DSS's Adult and Family Services Unit manages five programs, each having different policies and regulations:

1. Special Assistance In-Home
2. Guardianship
3. Representative Payee
4. Adult Protective Services
5. Adult Care Home Monitoring

Despite the differences in the programs, the supervisor and social workers often needed to access similar information for clients who utilize multiple services. They also routinely needed to cover each other's cases across the five programs, or answer questions during busy times or when a worker was out of the office.

Because each program required a separate hard copy case file, workers could not easily access case information stored in paper files by separate workers.

The supervisor was also challenged to monitor and advise her workers when they were actively working on cases because there was no efficient way to track down and review paper files in real time.

"Before Northwoods, it was all paper. It was not automatic at all. They would go out and do the evaluation and I would usually have to wait until the end of the evaluation or the end of their assessments to review cases," said Carol Larkins, Adult and Family Services Supervisor.

The biggest and most concerning challenge was trying to balance paperwork requirements with spending quality time with clients. Social workers wanted to make more home visits and referrals for services, but spent a lot of time documenting their work or completing forms back in the office.

"Going on a home visit meant lots of paperwork. We had to print all our releases, all our forms, everything we needed for our home visit for clients to sign or for us to complete. Then we would come back to the office and have to document everything from the home visit," said Jessica Godwin, Adult Services Social Worker III.





## DOCUMENT MANAGEMENT BOOSTING CLIENT SERVICE

Adult and Family Services implemented Northwoods' document management solution to automate paperwork for social workers and give the supervisor real-time visibility into case documentation so she can support the workers, respond to questions, ensure compliance, and improve service delivery.

In the office, documents and case information are electronically linked to the client, but can also be viewed by program in Northwoods' office-based document management solution, Compass® Pilot. The supervisor and workers can view current and historic case and client information for any of the programs that fall under Adult and Family Services.

"It helps me to see what the workers are actually doing. With Northwoods, they are able to keep up with their dictation a lot easier and all the forms are filled out. It gives them some guidance about what they need to ask or what they need to do in their individual cases," Larkins said.

The universal access to case files also makes filling in for another worker as simple as possible.

"If somebody calls and another social worker is out, I can just click on the client's name and everything is there and it's divided in tabs according to the program," Godwin said.

Social workers are repurposing 1-2 hours every day because they can update client and case information, complete new forms, and have the clients sign forms electronically

using Compass® CoPilot on the iPad during home visits. When workers get back to the office, they no longer have to recreate handwritten notes or scan in signed forms because their work has already been synced between Compass CoPilot in the field and Compass Pilot in the office.

"We're able to complete everything while we're actually in the home instead of a little bit there and a little bit in the office and little bit on the phone. We can do it in one step now," Godwin said.

Social workers use the time savings to focus on calling collateral contacts, returning phone calls, or making more home visits, all of which ultimately improves relationships and client service.

Completing electronic forms is more efficient because basic information such as the client's name and address can be automatically pushed into a single form or group of forms for a particular service, saving social workers time they used to spend manually filling out the information. Forms are grouped by program, so when social workers click on a specific client, the group of forms to be completed for that program is displayed automatically with information already filled out.

Overall, social workers say that organized, electronic access to client and case information in the office and in the field helps them create a more holistic plan to ensure all their clients' needs are met.

"It's worth every penny.  
Find the money to  
purchase it."



– Susan Moore  
Director



"I've been in social  
services for 27 years. I  
was very reluctant, but  
now I love it. I would  
recommend Northwoods  
to any county. It was a  
wonderful change."

– Melissa Baker  
Adult Services  
Social Worker III





"I would recommend the Northwoods solution. It improves accuracy and it saves a lot of time."

– Jenifer Hopkins,  
Adult Protective Services Social Worker

## CONCLUSION

With Northwoods' office- and field-based document management solutions, Lenoir County DSS' Adult and Family Services social workers are no longer torn between completing documentation on time and spending quality time interacting with clients. Because social workers can use Compass CoPilot to capture critical data and access necessary case documents and local forms in the field, their documentation is up to date and accurate. Social workers have more time to focus on engaging clients, building trust, and delivering quality service.

## ABOUT NORTHWOODS

Northwoods only focus is helping state and county human services agencies increase client service levels and productivity while cutting costs — allowing them to do more with less. Northwoods' human services software solutions are designed around caseworkers and social workers, not data. Our Compass® products automate the flow of client and case information based on how workers throughout the agency need to use it. To learn more, visit [teamnorthwoods.com](http://teamnorthwoods.com).



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