

USING CUSTOMER FEEDBACK TO PRIORITIZE NEW FEATURES.

We value agencies' feedback and insight into how Traverse® can provide more value for caseworkers. Here are the top new features we've released so far in 2021 based on requests from our customers.

1

EXACT MATCH FORMS

What we heard: The way a community partner form looks when it's completed and put away in the file matters. Third parties may reject forms that aren't formatted properly.

What we built: Exact match forms optimize how caseworkers enter in information. The completed electronic version looks like the original forms provided by courts, hospitals, schools, and other service providers.



2

STAFF MANAGEMENT

What we heard: Supervisors and administrators are not usually assigned to cases, but need to be able to easily find and access their unit's caseload to provide proper oversight.

What we built: A new Staff tab is visible so designated users can clearly see a real-time view of workers' caseloads. It provides supervisors with a searchable list of workers and their cases, which they can use to navigate to individual cases for more information.



3

FORMS VISIBILITY

What we heard: Supervisors want more visibility into cases to support better collaboration.

What we built: Caseworkers and supervisors can now see all in-progress forms—regardless of who started them. Displaying in-progress forms is a first step to make working with forms more efficient and shareable.



4

HIGHLIGHTING WITHIN A PDF

What we heard: Being able to see in context where terms are mentioned in a piece of content makes the information much more usable.

What we built: Caseworkers previously had to view the text version of a document or form to see anything highlighted. Now, Traverse highlights on the PDF to make it easier for caseworkers to view keyword searches and concepts in context.



WANT TO LEARN MORE?

Watch our Traverse Feature Preview for a closer look into how the software helps our customers prioritize high-value work and engaging families.