



Case Study

Jefferson County Division of Children, Youth, and Families Frees Up 580 Hours a Week for Caseworkers to Spend in the Field

Executive Summary

Jefferson County, Colorado

Challenge: Reduce the time caseworkers spend entering field notes into the state's case management system

Solution: Provide caseworkers with digital pens, which electronically capture notes as they write on their usual forms

Business Impact:

- Projected to free up over 29,000 hours of caseworker time, worth \$560,000 annually
- Improved audit performance
- Enhanced employee satisfaction

Challenge

The fourth largest county in Colorado, Jefferson County is home to more than 538,000 residents. The Division of Children, Youth, and Families (CYF), part of the Department of Human Services, provides protective services to children and youth who are at-risk or are victims of child abuse or neglect.

To provide the best service to its clients, Jefferson County CYF strives to maximize the time that its 145 staff can spend in the field meeting with families instead of duplicating data entry documentation in the office. Whenever caseworkers have contact with someone involved in a case, they are required to enter a Report of Contact into the State of Colorado's case management application, called Colorado Trails. "Our caseworkers were documenting their contacts with pen and paper in the field, but they were not always able to enter the documentation into the state case management system in a timely manner," says Barb Weinstein, finance and resource manager for Jefferson County's Division of Children, Youth, and Families.

Jefferson County CYF wanted to transform the way that caseworkers captured case information, to meet four goals:

- *Use caseworkers' time for best value:* "We performed a workload analysis and discovered that caseworkers were spending nearly 50 percent of their time in front of a computer," Weinstein says. "This did not support our objectives as a human services agency."
- *Meet audit requirements:* Bi-monthly audits by state, local, and federal agencies underscored the need for more timely data entry. CYF wanted a solution that would transfer caseworkers' notes into the case management system with as little time and effort as possible.
- *Improve job satisfaction:* Typing handwritten notes into the case management system is time-consuming and tedious for caseworkers. "People who become caseworkers want to work with people to change their lives for the better—not do data entry," says Weinstein.

The Problem with Laptops

In 2004, Jefferson County CYF attempted to provide documentation relief by providing its caseworkers with wireless laptops. The idea was that caseworkers would type

information directly into the case management system during meetings at clients' homes and at schools. But caseworkers quickly discovered that the presence of a computer sometimes made people feel uneasy or inhibited them from sharing important information. "Our mission is human services, and our interactions are supposed to be about relationships," says Weinstein. "Having someone type into a laptop made our clients uncomfortable."

The division still uses its laptops for general business use but sought another solution for documentation relief. "We wanted a simple solution that would preserve the personal touch of our interactions rather than distracting clients with computers," Weinstein says.

Solution: Digital Pen

After hearing about digital pens from another State of Colorado department, Jefferson County CYF decided to investigate, and issued a request for proposal. From the 13 responses, CYF narrowed the field to two vendors, based on customer service and price point. After conducting a two-week pilot with both finalists, the agency selected the PenData® TransScribe® Enterprise solution. "PenData stood out because of its commitment to customer service," says Weinstein. "They were very flexible about meeting our unique needs for form development, and for collaborating with the State of Colorado's IT group to link TransScribe with the state case management system." In addition, the agency's caseworkers liked the PenData solution because of its ease of use, and the IT group appreciated the ease of installation and administration.

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Jefferson County CYF began using PenData's TransScribe solution in July 2008, initially for the Report of Contact form, which caseworkers fill out every time they have contact with anyone involved in a case. After the agency provided PenData with its original form, PenData printed a replica whose only difference is a tiny dot pattern that appears as a lightly tinted gray background. Caseworkers were given a digital pen, docking station for their PC or laptop, and a supply of forms. The new process is as follows:

- Caseworkers fill out the form during the meeting as they have always done. The difference is that the digital pen not only writes on the form with ink, it saves the inkstrokes and remembers where they were written on the form.
- When clients need to sign a form, they use the pen, too. They notice nothing out of the ordinary about the pen.
- When caseworkers return to the office, they place their pen into the docking station. This automatically transfers the form notes into the TransScribe Enterprise client software on the caseworker's PC or laptop, eliminating the need for typing.
- Whenever caseworkers have time—daily for some, every few weeks for others—they click a button on the TransScribe PC application to start the TransScribe Enterprise Server application, which shows an exact image of the handwritten form on one side of the screen and the handwriting converted to computer text on the other. They quickly look over the text and edit it if a character or word is

recognized incorrectly. “Recognition accuracy is better than 95 percent for most of the staff, which is phenomenal,” says Weinstein. The few people whose handwriting is more difficult to recognize have improved accuracy by submitting a couple of additional handwriting profiles.

- The caseworker can simply cut and paste the text into the state’s case management system, which takes just a few seconds, according to Weinstein. PenData is working with the State of Colorado IT department to integrate TransScribe with the case management system to save even those few seconds.
- Some caseworkers save the handwritten image and text as a Word file.

The PenData TransScribe solution meets Jefferson County CYF’s requirement to comply with the Health Insurance Portability and Accountability Act (HIPAA) for case documentation. The information is encrypted throughout the entire process—in the pen, on the employee’s PC, and on the server. Even if someone loses a pen, the person who finds it cannot read the information unless they have the owner’s docking station, PC, username, and password, and access to the Jefferson County CYF TransScribe server.

Since completing the successful pilot with the Report of Contact form, Jefferson County CYF has begun using the PenData solution for five more forms and has another four in the pipeline.

Business Impact

The PenData solution has transformed the way that the Jefferson County CYF manages its documentation, improving service effectiveness and caseworker productivity.

Freed up time for caseworkers

Caseworkers immediately began saving four to six hours a week by not having to type their notes into the State of Colorado’s case management system. “Assuming an average weekly time savings of four hours and an average hourly salary of \$20, then the PenData solution has freed up \$560,000 of caseworker time annually,” says Weinstein. “Our division has increased its value by reallocating staff resources from data entry to developing treatment plans for children and their families.”

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Improved Job Satisfaction

Weinstein has heard from many grateful employees who appreciate the time savings. “One caseworker said she has reduced the time she spent on data entry each week from 15 hours to one,” she says.

The newest staff members embraced the PenData solution right away. Most veteran staff members were won over by enthusiastic reviews from their peers and gentle encouragement from supervisors. “We gave people time to get used to the new system rather than requiring them to use it right away,” says Weinstein. Just a few months after adoption, approximately 80 percent of staff were using the PenData solution.

Better Audit Scores

Jefferson CYF underwent another audit just one month after caseworkers had begun using the PenData solution. “Our documentation scores improved, and we expect to see even more improvement as we use PenData for more forms,” Weinstein says.

Next Steps

PenData is working with the State of Colorado IT department to integrate TransScribe Enterprise Server with the Colorado Trails case management system. When the integration is complete, caseworkers will be able to just click a button to move their edited notes directly into Trails, eliminating the few seconds they spend now to cut and paste.

Jefferson County CYF also plans to start using TransScribe Enterprise to capture clients’ electronic signatures, including the date and time. This will enable CYF to begin phasing out physical storage of paper documents, saving expensive storage space.

Weinstein concludes, “Each new form we add to the TransScribe system will save more time for caseworkers, enabling them to spend more time in the field helping to improve the quality of life for our clients.”

For more information on PenData solutions, visit: www.pendatasolutions.com.
To set up an appointment with PenData, email: info@pendatasolutions.com.
For more information about the Jefferson County Division of Children, Youth, and Families, visit: <http://www.co.jefferson.co.us/cyf>.