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Virtual Case Management: Can a State Agency *REALISTICALLY* Survive Without Paper?

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Abstract

In the fall of 2000 the state of Illinois Department of Human Services, Office of Rehabilitation Services (ORS), introduced its new Virtual Case Management System, (VCM). This exciting new concept in case management greatly reduces paperwork and labor-intensive handling of customer files. VCM streamlines status movements, reduces errors and improves timeliness of services. Illinois continues to upgrade its new technology to include time saving features and assure safe, confidential treatment of customer information.

The Virtual Case Management System (VCM) required years to design, develop and implement. Illinois sought input from all levels of the State Rehabilitation Agency. Though staggering in terms of manpower and resources, the state's investment in VCM proves itself worthwhile through the drastic reduction of time spent on case management and paperwork, and improved services to rehabilitation customers. Currently paper files are still in use, but contain "far less" paper than prior to implementation of VCM. Paper case files still hold "signature-required" documents such as Application for Services, Individual Plans for Employment, Financial Analysis, Releases of Information as well as medical documentation, reports from vendors, school and staffing reports and other documentation necessary for vocational rehabilitation services. However, when possible, data and information are stored electronically.

Phase II of VCM will include distribution of Laptop computers and portable printers to field staff in the fall of 2001. Staff will enter data while in the field and load the information onto the system when the laptop is docked to the mainframe upon return to the office. This self-reliance of field staff will increase efficiency in time management as it eliminates the need to transfer informational paperwork to the computer system by a clerical staff member. Additionally, system of electronically "checking out" case files prevents conflicting entries from occurring. This is another time saving element of VCM. Other Phase II plans include distribution of electronic signature pads and scanners, which will store required case documentation and signatures electronically. Some placement agencies and other service providers currently submit reports via e-mail for electronic cutting and pasting into case notes. Throughout Phase II laptops, scanners and portable printers will eliminate the need for paper case files.

Reducing duplication of effort is one of the most enticing aspects of VCM. Data is entered into the computer one time and, information can be transferred to various forms which include, but are not limited to: Releases of Information or referrals to agencies, vendors and other service providers. The implementation of Phase II also anticipates the merging of the fiscal management of case service dollars into VCM.

Status movements occur automatically when required documentation has been entered and confirmed with staff identification and passwords. Despite this new method, adherence to RSA rules and regulations remain unchanged regarding procedures and requirements of data entry and status movements. Assignment of DOT code, disabilities codes and other pertinent data occur automatically when the appropriate internal search engines are used. Counselors no longer enter specific DOT code, or disability code number, but choose from an available/chosen screen, until the appropriate text descriptors are selected and the appropriate RSA disability code, DOT code etc, are automatically entered and recorded. Case service expenditures are reported on VCM so staff can track status of authorizations and invoices. Letters, also, for initial interviews can be automatically generated. A merge feature is nearly ready for distribution to field staff; this will allow letters, or other contact information, to be sent to customers. Caseloads can be filtered by numerous categories to customize mailings.

How does VCM work?

Customer referrals are entered into the computer at the time they are taken. Counselors immediately receive their case assignments or supervisors may receive information regarding case assignments or transfers if special needs arise. Data collection such as initial interviews, IPE development and other case management tasks occur in the usual fashion, with information entered into the computer and saved upon arrival. Entry of all status movements occurs automatically in a 2-part process. Information is gathered and saved. If a customer signature is required, the document can be printed and signed in the office, or taken into the field for signature. After collection of the customer signature, the document is completed, a date is assigned and the status movements implemented and recorded. Counselors do their own data entry which releases clerical staff to be more involved in provision of direct customer services such as, job coaching, employer development, job readiness training, resource development and other tasks previously done only by counseling staff. Counselor signature is applied electronically via use of staff ID and password. Each staff has their level of authority linked to their user ID.

As part of the ORS commitment to providing customers with World Class Customer Service, efforts are being made to provide services that are Faster, Friendlier and Simpler. ORS staff at all levels work for more direct customer placement and limit the use of traditional placement agencies to customers with the most severe disabilities. Direct placement by ORS staff saves taxpayer money and allows the agency to purchase specific services for a fee, rather than “complete placement packages”

Illinois ORS staff members actively involve themselves with various aspects of case management including job development, placement services and job retention services. Additionally, Illinois ORS management and staff have made a commitment to double competitive outcomes, and decrease time from application to placement for customers who are job ready. The technology provided to staff increases the probability that these goals can be achieved.

Staff Reaction

An informal survey of staff shows that most staff members feel VCM reduces time spent on paperwork and increases time available to assist customers in locating employment. One major concern exists: the system tends to be slower than desired or expected. Currently, ORS and the Department of Human Services is addressing system speed and efficiency through a restructuring of the database. Throughout the eight-month trial period, initial concerns about the stability of the system proved unfounded as the current system suffered fewer “crashes” and less down time than the previously used data management system.

The primary complaint at this time is that distribution of laptop computers and portable printers has been delayed due to budgetary concerns and chain of command approval process. Despite the delay, distribution of laptops is expected by late summer or early fall. While this will require some additional training, staff members agree that increased portability will further streamline services improve case management and customer service.

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