CASE STUDY: STATE OF NEW JERSEY DEPARTMENT OF HUMAN SERVICES

Dynamics CRM increases children’s medical fund’s efficiency and visibility

Overview

Catastrophic Illness in Children Relief Fund Commission (CICRF) is a financial assistance program within New Jersey’s Department of Human Services. The program began in 1988, through legislation after New Jersey recognized that families with or without insurance are vulnerable to extraordinarily high uncovered medical expenses. Program eligibility is dependent on three factors:

- The families must be residents of New Jersey for at least three months
- The child must be under 21 years of age at the time of application
- The expenses incurred should exceed 10 percent of the family’s income and 15 percent of any family income over $100,000

Background

CICRF tracked the basic details of their applications and components of the program in an Access database. The organization relied heavily on paper and manual activities to manage processing of the applications received from families across the state. The program was growing, and the Access database had limited functionality and lacked controls and flexibility to accurately reflect internal process.

The database also did not assist them in streamlining their processes in an efficient and productive manner, with many instances of duplicated data entry efforts. Their system could not provide data validations; for example, a family can only be reimbursed for the purchase of a van once in their lifetime. Management did not have a clear view into the application process, and it became increasingly difficult to manage the tasks for each of the analysts working on the cases.
Annual report development was also a very cumbersome task. Specific information had to be gathered to provide several statistics on the program for the governor’s office, the commission members, as well as the public. The staff had to manually go into each physical file and obtain the necessary data on an individual basis. A large amount of critical information was not capable of being captured in the Access database.

In addition, the existing database was not able to perform proper follow-ups for people inquiring about the program. Inquiries were not being tracked in the system; instead, they were captured in notebooks and spreadsheets.

**Project**

The RSM team implemented a Microsoft Dynamics® CRM solution to help alleviate CICRF’s issues, due to ease of modifications and user familiarity with Microsoft technologies. The initial phase of the project provided an intake portal to accept applications via the web and developed controls for consistency and validation in data entry.

Applications submitted through the portal are immediately available in Dynamics CRM for the deputy director to screen before assigning the application to the appropriate analyst for further processing. After submission, the analysts can update the stage of the application as it progresses, while instantly providing management with better insight into the process. All communication efforts are documented in one centralized system.

Furthermore, to develop a more consolidated process, the Microsoft Dynamics CRM system was integrated with the following systems:

- Department of Labor
  - Obtain the W–2s of the families applying for assistance with the program.
- Department of Treasury – Taxes
  - Obtain the most recent tax return information.
- Department of Treasury – New Jersey Comprehensive Financial System
  - Obtain the information on when the Department of Treasury has released the check for the family, and the amount of reimbursement to the family or provider.

In recent months, CICRF continues to adjust and improve system functionality, as they see more opportunities to improve efficiencies. Of late, they are working on improvements to their public outreach programs and competitive analysis.

**Outcomes**

As a result of the Dynamics CRM implementation, CICRF is now more efficient and can provide higher-quality service to those in need. The new platform has reduced data entry time and errors and centralized the application intake process to provide full visibility of applicant historical records. The process has been streamlined to include data controls and validation, and troublesome manual practices have been eliminated.

Other benefits of RSM’s service to CICRF included:

- Better caseload assignment and management due to improved application visibility
- A 15 percent increase, year over year, in the number of applications processed
- Average application processing time reduced by 500 hours
- Improved access to data and reports for the governor, lieutenant governor and commission members
- Trends analysis quickly provided by program (where money is spent and what improvements are being made)
- Management and maintenance of ICD 9 and ICD 10 codes associated with child’s illness, eliminating the need for a third-party application
- Expense tracking capabilities for child, providing details of each expense
- Improved capture of insurance information to determine insurance expense