Beyond FoxPro: Your case management system may require a speedier, real-time solution

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Health and human services agencies are charged with providing care and outreach that improve people’s lives. Managing this essential service delivery is a complicated task and when existing processes and systems are not optimal, workload is inefficient and provided care could be jeopardized. Continuous improvements and updates are required throughout all agency systems to assure the best service is offered.

One vital improvement area to focus on includes an agency’s case management system. In many instances, unsupported legacy solutions are used to capture client or patient data. Microsoft’s FoxPro is an example of a legacy platform that is no longer supported. While FoxPro has been widely used among health and human services organizations to manage caseloads, it may be a critical misstep to continue using it, particularly since the solution has been discontinued by Microsoft and its lack of updates have made it vastly outmoded.

For instance, as I’ve worked with agencies using FoxPro, many have wrangled with challenges around its nonmobile nature. In several instances, caseworkers are relegated to recording information in written form while out in the field, later transferring this paper-based data to a database back at the office. This paper-to-later-entered process is rife with inefficiencies due to the duplication of work and the increased chance of error due to multiple entries. Mobility addresses that workflow issue, but FoxPro cannot support that key solution.
Creative options

Considering FoxPro’s limitations, what are your options? There are many creative ways to address your needs and risk concerns. Here are just a few.

- Extended client relationship management (CRM) –
  This approach leverages the benefits of an application development framework to reduce the risk and time to migrate off of the legacy system.
- Custom re-platform – Some agencies opt to create a new custom application on .NET and SQL Server (or a similar platform). There are some frameworks and products available to help with this.
- Virtualize – Some circumstances may warrant the use of application virtualization or virtual desktops to isolate and run the application outside of the native environment.
- Do nothing – While not often recommended, it is an option. The cost of implementing other mitigation strategies could be higher than the risks of remaining with FoxPro. However, this option should be revisited on an ongoing basis as the risk of not doing something could increase with increased caseloads and other external variables.

Extended CRM key benefits

In the case of transitioning from FoxPro to an extended CRM platform, I’ve seen agencies experience key benefits; a significant advantage is the minimized change impact on end-users. The configurable nature of an extended CRM, such as Microsoft Dynamics CRM, allows the retention of much of the terminology and verbiage that end-users were accustomed to seeing in their FoxPro application. This makes it easier for end-users to learn and navigate the new system. An extended CRM platform also:

- Eliminates manual, time-consuming processes
- Increases collaboration and visibility, and facilitates smooth communications among stakeholders
- Leverages the full scope of providers for recipients of services
- Standardizes service delivery by leveraging stakeholders’ best practice procedures
- Reduces the likelihood of fraudulent filing for services in multiple jurisdictions
- Adds scalability to handle growing caseloads without adding additional in-house resources
- Lowers long-term support and maintenance costs

Other features include:

- E-signature for all documents
- Routing and signoff of plan via alerts
- Document management of all items related to the individual
- Transfer of caseload and individuals between agencies
- Real-time case management and case notes
- Role-based security
- Complex approval of workflows
- Visibility of applications being processed from intake to outcome
- Oversight of approved applications and those awaiting disbursements; a true 360-degree transparent view of the process
- Improved operational process so caseworkers are more efficient
- Government compliance with data stored on a government-secured cloud
- Service planning and outcome management
- Complex tracking and reporting

Questions to ponder

Whether you decide to continue with your current FoxPro application, or transition to a new platform, it is important to understand the risks of running applications that have lived beyond their supportable years. Key questions to consider include:

- Will your application be compatible with security updates, patches and fixes?
- Will it still work when you upgrade to Windows or Office?
- Can you continue to find skilled FoxPro resources?
- Will you be compliant with data security and privacy laws? In particular, is your current FoxPro system compliant with the Health Insurance Portability and Accountability Act (HIPAA)?

As health and human services agencies consider a replacement system, an extended CRM platform presents an opportunity to facilitate a person-centered business process that takes into account what is “important to” and “important for” each person. If you are beginning to research your agency’s options, now is the time to consider how an extended CRM platform can reduce paper-based, time-consuming and resource-intensive processes by deploying technology around person-centered care.