

CASE STUDY: OHIO DEPARTMENT OF DEVELOPMENTAL DISABILITIES

Person-centered case management
solution helps developmentally disabled

Overview

The developmental disabilities' community is shifting to a person-centered approach, where the individual drives the development of their individual service plan (ISP), which outlines goals and the plan to reach those goals (including what supports and providers will be used). This includes what's important to them and for them, and involving them in the decision-making process. The person-centered approach is critical to helping individuals live fulfilling lives and realizing their dreams.

To support this shift, 18 county partners (referred to as the county collaborative) embarked on a business transformation process called *imagine*. With the support of the Ohio Department of Developmental Disabilities (DODD), the County Collaborative focused on developing common business practices that enable the person-centered philosophy, including standardizing the ISP process and improving the delivery of service. The team also looked for ways to reduce administrative expenses and increase efficiency through sharing information and resources across counties.

To support the work of the team, DODD offered to build a technology solution that made it easy for participating counties to implement the new business processes. The solution would develop a case management system that would improve service delivery for individuals and families, county boards, and providers, while allowing individual counties to retain their autonomy and identity.

Microsoft Dynamics CRM® was selected as the system's core, and while the client was impressed with our team's proposal and experience, they had reservations because they knew other states' agencies attempted something similar and failed. RSM's team invested significant time creating screen mock-ups to illustrate the Dynamics CRM system's effectiveness in automating case management processes. DODD liked RSM's creative approach, and the engagement began in earnest.

The project

DODD oversees a statewide system of supports and services for people with developmental disabilities and their families. Eighty-eight county Boards of Developmental Disabilities deliver programs and services to county residents. Because the system is county-based, each of the 88 counties has largely unique business processes and service delivery systems that are tailored to the needs of their local community.

While this system has its benefits, it presents some challenges when developing a technology solution to support case management. Some of the considerations the RSM-DODD team focused on included:

- Varying processes, procedures and providers across counties
- Established paper-based processes, which sometimes conflict with each other and require a multistep approval process
- The need for collaboration across the team, some of whom are outside of the state's offices and network; the team may include the individual, guardian, case financial manager, Human Rights and Behavior Support Committees, providers and others
- Separate provider lists (by county), which can make it difficult to access the full scope of providers able to work with an individual
- A diverse user base with varying needs; input was sought from 18 different counties, which was tied to more than 500 individual user stories and numerous specifications
- Required integration with multiple legacy systems
- Compliance with specific HIPAA and section 504 guidelines to protect the privacy of individuals' case files, which contain sensitive personal information

Outcomes

Over the course of 12 months, RSM's team and DODD, using a "blended team" approach, completed an analysis of a three-year requirements-gathering process and developed the *imagine* system to support person-centered case management. The newly designed *imagine* system:

- Makes it easy to develop goals and outcomes by capturing information in eight key life areas, and sharing that information across the team for ISP development

- Provides complete information about each individual's ISP, including agreement and approval, goals, services, providers, funding sources and progress
- Provides an easy method for tracking agreement and approval of the ISP
- Tracks changes and creates snapshots of the ISP for auditing, as well as consolidates reporting for easy distribution to stakeholders
- Leverages dashboards to enable easy access for caseworkers to see the status of ISPs and high-priority tasks
- Keeps all team members informed of all outstanding tasks and key changes
- Replaces manual processes for tracking and calculating local services, budgeting, funding sources and approval of services
- Integrates key data from other systems to streamline the case workers' workloads and provides a more complete view of the individual and their case

In addition, DODD created an ISV portal solution, allowing everyone involved in a specific case to view the individual service plan. This transparency helps ensure each service provided makes sense and is synergistic, not counterproductive.

Customer excellence award

As the engagement wrapped up, DODD was pleased with the result. Microsoft also noticed the work and nominated DODD for the Microsoft Dynamics Public Sector Industry Customer Excellence Award, with RSM as the engagement partner. In each category, award winners are chosen on their ability to provide amazing experiences for their customers through the use of their Microsoft Dynamics solution.

In naming DODD a winner, Microsoft commented, "The *imagine* project is not only an inspiring story about improving the lives of individuals with developmental disabilities, but is one of our best examples of how government organizations can use CRM to create a 360 degree view of their constituents."

Currently, DODD has started implementing the *imagine* system within the 18 county collaborative. Other counties wishing to participate will soon be able to begin using the *imagine* system.

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