

4th Annual NCACDSS Best Practices Awards Nomination Form

Category: CSMIE#5 Tier 3 Cost Savings Measures and/or Improvements in Efficiency

Project Title: Case Documentation Project with Transcription Relief Services

1. **Project/Program Summary:** Briefly summarize the project's history, purpose, timeline and budget.

Purposes: To find an efficient, alternative way of completing case narratives, home studies, court summaries, and other forms of case documentation. To reduce the time social workers spend in the office after hours or on weekends to complete documentation. To find an easier way to dictate information by phone from any location than to hand-write or type documents for case files. To have a positive impact on staff retention. **History & Timeline:** Initial discussions began with Durham County in approximately June of 2005, the contract with Durham County was finalized in December of 2005, and actual dictation and transcription began in early March of 2006. Once all parties had signed the contract, TRS began the process of getting DSS set up in the TRS systems. That involved obtaining samples of each of the different reports that DSS uses so that corresponding templates could be built in the transcription program, as well as a list of all staff members so they could be assigned dictating IDs. During the setup process there were multiple conference calls between the involved parties at DSS and TRS to discuss the project's progress and review what still needed to be done to complete the project. A group of approximately 30 staff members was selected to be the first participants in the project, and additional staff members were added in groups until all staff members had been included. **Budget:** The cost is based on number of key strokes and currently averages less than \$5,000 per month. This is less than it would cost to employ staff who can give us the accuracy and turnaround time that TRS guarantees. The amount of after-hours and weekend time staff spend in the office has been reduced significantly. Case backlogs have also been significantly reduced. This alternative to case documentation has proven to be cost effective and has created needed efficiencies in the Child Welfare and Adult Services departments. It has also had a favorable impact on staff retention.

2. **Innovation:** Why is the program unique? How does your project differ from similar projects?

This project is unique to TRS because Durham County Department of Social Services is their only client that is not a healthcare facility such as a clinic or a hospital. The TRS systems have worked just as well for Durham County Department of Social Services as they do for the clinic and hospital clients. Both the process and the end results are the same—the client dictates into the system and TRS transcribes that dictation and sends back the completed narratives within 48 hours. This allows technology to easily match, move and attach the narratives electronically and/or in printed form to case files. It is unique to Durham DSS because it provides Child Welfare and Adult Services staff with an alternative to hand-writing or typing case dictation, court summaries, home studies, transfer summaries, etc. while guaranteeing a 48 hour turn-around time.

3. **Project Success and Impact:** What were the objectives? How well were they met? How widespread is the impact of the project/program? What is the anticipated long-term

impact? Did the project involve collaboration with other agencies, non-profits, businesses, etc.? Describe the outcome of the collaboration. _____

Objective: *To relieve the DSS Child Welfare and Adult Services staff members of the time-consuming task of hand writing or typing their own case documentation and reports, thus allowing them to spend more time performing the other responsibilities of their position. Also, to have a positive impact on staff retention by reducing the need for staff to be in the office after-hours and on weekends to complete paperwork. Also to reduce the number of cases with overdue case documentation. All of these objectives are being met and the service is very popular with our staff. Participation: The project began with an initial group of 30 staff members who had specifically expressed interest in using the service. During March, the month that dictation actually began, the total amount of dictation input was **14:07:59**; that has steadily increased and during the month of June the total input was **30:15:57** of dictation, an increase of over **100%**. There currently are 113 DSS staff members set up to dictate into our system. Collaboration: TRS IT and Implementation staff worked with Kenna Phillips of Braken, LLC, on the technical portion of the project, who acted as liaison between TRS and Durham County's IT staff.*

4. **Project Effort and Difficulty:** How well did the program use limited resources? What obstacles or challenges did you overcome? How was this done? _____

From the TRS perspective: *One challenge was the fact that none of the DSS staff members had used a transcription service before, so they did not know how to dictate. Our sales representative scheduled training sessions for them on-site and instructed the staff on how to call in to the system to dictate, as well as provided written instructions and tips on how to dictate effectively. Another challenge was how to keep the reports for the three different divisions within DSS separate from each other. That was accomplished by setting up a separate delivery folder for each division, from which the staff members may retrieve their completed reports. They can then view the reports, make any changes they deem necessary, and print them out. TRS stores the reports for a period of 90 days after completion of the report, and those reports are available to be resent to the county if necessary. It was also a challenge for TRS to staff for this client. Since DSS had never used a service before there was no way to predict what type of volume would be coming in, in terms of minutes of dictation. We handled that by starting with just 30 dictators and adding additional dictators on a gradual basis.*

5. **Ability to Replicate Project:** Can this project be duplicated in other counties? What could counties do to minimize obstacles and problems? _____

From the TRS perspective: *Yes, this project could very easily be duplicated in any other county and/or department. State of the art dictation and transcription systems are already in place; it is just a matter of getting the department's forms and staff members set up in a system, and establishing a connection to a computer on the client side to deliver the completed reports. Both are simple to accomplish. On the county side all that is necessary is that the staff members have access to a telephone, meaning that they can dictate from their offices or from home or from the field, whichever they prefer. No other equipment is necessary.*
