

Caseworker Connect Usage Scenarios

Caseworker Connect can help you work more effectively. Explore the stories below and see examples of how Caseworker Connect can help people organise, analyse and share information.

Caseworker: Robert

Robert, an example of a case worker for a General Help with Casework provider, uses Caseworker Connect to complete all of his case notes and updates after a client visit in one step, when it used to take as many as five. Because of the real time support in Caseworker Connect, Robert's updated case notes and information are accessible to, and reusable by, everyone in his team. Caseworker Connect helps Robert and his organisation:

- Save time and effort when updating information, reducing error-prone rework.
- Make information available to everyone, leading to better-informed decision making and a more productive service.
- Free up time so Robert can pay more attention to client needs.

Before Caseworker Connect

Before his organisation deployed Caseworker Connect, Robert entered the same information - contact information, referral statistics, diary sheets, and other details - multiple times and in different applications after each client visit. The different applications did not communicate or cross-validate data with one another. Robert had to write up notes in Word, update referral figures in an Excel spreadsheet, update his schedule in Outlook, and calculate his monthly report figures with a calculator.

After Caseworker Connect

After his organisation deployed Caseworker Connect, Robert can save time and effort when recording his work and spend more time interacting with clients.

Efficiency

Robert can complete his reports and updates far more efficiently. Robert enters all of the information for his case work visits in just one Caseworker Connect module. Caseworker Connect automatically calculates both his case load and statistics and helps Robert create reports by selecting alternate views of his case load. Caseworker Connect even validates his entries for accuracy.

Flexibility

Caseworker Connect is designed to easily gather and manage the highly structured yet varied types of information Robert needs to submit - dates and times in numerical form, client notes in free text format, and other information.

Reusable Information

The information Robert enters through Caseworker Connect is immediately available throughout the organisation. This means that other case workers and his manager have instant access to updated information they need to make better-informed decisions. For example, with more timely updates on case progress, it is easier for other members of Robert's team to cover for him and Robert's manager to make accurate reports.

Service Manager: Sheila

Sheila, an example of the service manager of a 10-person casework service, uses Caseworker Connect and its integration with Microsoft Office to view the status updates of her case workers, who travel across the county. Caseworker Connect compiles the information from all her team into a consistent view, helping her find the information she needs to make better-informed decisions. Caseworker Connect helps Sheila and her team:

- Gather information consistently and efficiently, so that she has the right information to make better-informed decisions. Caseworker Connect helps streamline the entire reporting process and make it more accurate.
- Monitor quality and focus in the areas where it is really needed and gather information for independent file reviews.
- Serve their clients better by better allocating resources to focus on their needs.

Before Caseworker Connect

Before her organisation deployed Caseworker Connect, Sheila could not stay on top of her team's work, especially since there was no consistent way for her staff to give her status reports. She received updates in several formats—including e-mail messages, voice mail, and hand written notes - and an attempt to create an in-house reporting process failed because it was too rigid and lacked flexibility. Sheila had a difficult time keeping track of client and staff needs, and the lack of high-quality information made it difficult for her to make critical decisions.

After Caseworker Connect

With Caseworker Connect deployed throughout her company, Sheila can gather information consistently and efficiently, so that she has the right information to make better informed decisions.

Efficiency

Sheila can gather information from her team in a consistent and efficient manner. She can monitor each member of her case work team regularly.

Flexibility

Having a recording and reporting tool that is flexible to their needs is crucial to the case workers, who can complete or skip sections and fields to capture all of the information pertaining to their case. For example, one case worker may include comments in the optional section regarding client notes, while another might skip this optional section entirely to focus on the section for urgent action items. Caseworker Connect satisfies the need of the case workers for flexibility while still providing a consistent structure and format for the information being gathered.

Sharing Information

Using a simple report feature within Caseworker Connect, Sheila can merge all of her team's work into just one management report. She then has a summary view of the information that enables her to quickly review all of the highest priority items.

Since this Caseworker Connect information is displayed in a web browser, Sheila can distribute reports to trustees and directors and re-use statistics in funding bids. In addition, Sheila keeps her team informed by posting progress reports to the Library.