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**Summary**

In-Home Supportive Services (IHSS) workers at Yolo County Health & Human Services Agency (HHS) need real-time access to case files and information so they can provide the right services to help IHSS recipients remain safely in their homes. Workers want to focus on building relationships with clients, but also have to balance extensive paperwork requirements. With Traverse, Northwoods' cloud-based software for human services, workers can simultaneously increase efficiency and engagement. Traverse lightens the paperwork burden and empowers workers with information so they can focus on ensuring recipients get the services and support they need to avoid out-of-home care.

Traverse is an easy-to-learn and worker-friendly program that assists us in performing our jobs in a more efficient and productive way.

— MARIA RODRIGUEZ-LOPEZ  
Adult Services Worker I, Yolo County  
Health & Human Services Agency

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### Summary

In-Home Supportive Services (IHSS) workers at Yolo County Health & Human Services Agency (HHSA) need real-time access to case files and information so they can provide the right services to help IHSS recipients remain safely in their homes. Workers want to focus on building relationships with clients, but also have to balance extensive paperwork requirements. With Traverse, Northwoods' cloud-based software for human services, workers can simultaneously increase efficiency and engagement. Traverse lightens the paperwork burden and empowers workers with information so they can focus on ensuring recipients get the services and support they need to avoid out-of-home care.

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## Challenges

IHSS workers at Yolo County HHSA need real-time access to case files and information so they can provide the right services to help IHSS recipients remain safely in their homes.

Workers spend most of their time on home visits and want to focus on building relationships with clients, but also have to balance extensive paperwork requirements. They typically make multiple visits on the same day and need to be familiar with each person's unique circumstances before entering their homes. Additionally, coordinating services requires a lot of collaboration and information exchange between workers, recipients, providers, aides, caregivers, and other stakeholders.

Without the right tools for managing information and prioritizing client engagement, recipients may be delayed from getting the services and support they need, which puts their safety at risk.

## Solution

Yolo County's IHSS workers use several modules of Traverse, Northwoods' cloud-based, commercial-off-the-shelf (COTS) human services software, to streamline service delivery. Traverse provides document management, forms management, mobility, case discovery and a customer engagement portal.

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Integrated with the state case management system CMIPS, Traverse allows IHSS workers to access and manage case files and information from anywhere, especially during home visits. They can complete assessments, referral forms, narrative notes, and other case documentation while visiting clients, plus scan and upload any supporting documents that clients provide. All this content syncs to an electronic case file that anyone with permission can access from anywhere, meaning no information gets lost in the process.

## IHSS AND ADULT SERVICES WORKERS CAN ALSO USE TRAVERSE TO:

- Easily access and manage recipient and provider data in the field, including data from CMIPS.
- Autofill forms—for example, to appoint an authorized representative—with known data before leaving the office that can be quickly completed on a mobile device while visiting with clients.
- Electronically route forms, like a provider requesting exception, to supervisors for signature or approval.
- Electronically route client documentation that comes to the agency via mail to the right worker for review.
- Assign and keep track of tasks while they're in progress, such as reviewing a request for paramedical services, to determine if further action is needed.
- Complete required forms and documentation to approve parents or caregivers as providers.
- Use full text search to find pertinent information in case files, such as client's medical histories.
- Securely exchange documents and information with recipients, providers, auditors, and external stakeholders.

## Results

Traverse allows IHSS workers to simultaneously increase efficiency and engagement. Maria says they can spend more time getting to know their clients and coordinating services, and less time worrying about paperwork because what they need is always on hand.

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### BUILDING RELATIONSHIPS WITH RECIPIENTS

“Each case we handle is unique, as well as each of our client’s needs. For example, one client might want to appoint an authorized representative while another one requires paramedical services. Therefore, having immediate access to all forms prevents delays in providing our clients with assistance when needed,” Maria said.

She added that this real-time access “makes us look more professional in front of our clients and builds their trust in us, knowing their needs will not be delayed because of missing documentation.”

### EMPOWERING WORKERS WITH INFORMATION

Workers can quickly familiarize themselves with key details of a case so they can focus on building deeper connections with recipients during visits. “It is important to review our clients’ cases before our home visits, so we get to know our clients’ medical conditions and have an idea of what to expect once we get to our clients’ homes, as well as knowing or having a sense of their abilities and limitations,” Maria said.

### SECURITY MEETS CUSTOMER SERVICE

Lastly, Maria says being able to scan and upload documents directly into a case file in front of clients brings peace of mind. “Some of our clients have an assigned power of attorney or conservator, so now when they provide us with a copy of these documents, it’s much easier and safer to scan it right away,” she said. “By scanning documents directly into each case in front of clients, we save time, and it also limits the risk of important documents getting lost in the mail.”

“Because Traverse has a mobile app, not only can we use our iPad, but our phone as well to complete this process,” she added.



### About Northwoods

Since 2003, we’ve been designing tools for caseworkers to manage, collect, view, and share content and data more efficiently. As a result, agencies using our web-based software and mobile apps can maximize productivity, decrease costs, and achieve better outcomes. Learn more: [teamnorthwoods.com](http://teamnorthwoods.com)



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