



Scott County Simplifies Collaboration with Secure Portal

traverse | connect

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Workers at Scott County Health & Human Services (HHS) are maximizing their time to collaborate with clients and providers by using one secure application to collect electronic signatures and exchange case information.

Summary

Disjointed processes for collecting signatures on forms and documents were costing workers at Scott County HHS too much time and resources. Now, they maximize their time and minimize their efforts using our secure portal, Traverse® Connect, and our web-based document management software, Traverse®. With one secure application, Scott County HHS staff can work from anywhere, prioritize client service, and communicate more effectively with clients, providers, foster families, and other counties, while protecting sensitive client information.

“
Staff can work from anywhere, anytime, and families can sign from anywhere, anytime.
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— KATIE ELLERAAS
Business Relationship Manager,
Scott County Health & Human Services

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Scott County Health & Human Services*

Challenges

Disjointed processes for collecting signatures on forms and documents were costing workers at Scott County HHS too much time and resources. Staff were using multiple platforms to gather signatures from clients, some of which cost between \$2 or \$3 per request.

“ At the worst, they were mailing out hard copies of documents and hoping to get them back, which often took multiple attempts. This was time consuming, it was costly, and frankly, it just wasn't working. ”

— KATIE ELLERAAS

*Business Relationship Manager,
Scott County Health & Human Services*

Other times, workers would get verbal permission from a client to speak with providers about referrals or starting up services, and then follow up with a signed release, which was another time expense. “It just was not a good way for us to gather the information we needed to gather as quickly as we needed to gather it,” Katie said.

These manual processes also made it difficult for staff to collaborate with external partners. “We've had instances where something needed to be signed from a provider, but it sat in somebody's mail room on their desk for a while, just due to a clerical error,” Katie said. “It's no one's fault, but this does cause concern and it does cause time constraints for staff and for clients.”

Even when documents could be shared electronically, the process left too much room for potential error, duplicate copies, or lost files. “Previously, we had systems where the document needed to be saved to the worker's desktop, uploaded into a signature system, and was then disseminated to the signee who signed and returned it. The worker then had to download the document from the system, save it to their desktop, and then save it to the system of record,” Katie said.

Solution

The agency has already implemented our software Traverse as its electronic document management system for over 100 people who provide social services support.

Now, the Traverse Connect module helps these workers collaborate more efficiently with clients and providers too. Traverse Connect is a secure portal built for anyone outside of the agency that has a stake in the case. It simplifies collaboration, significantly reduces the time it takes to exchange information, and removes barriers and inefficiencies so that workers can focus on planning and providing the right care for the people they serve.

HOW IT WORKS:

- Traverse Connect allows agency staff to easily request signatures on forms and share case content with authorized collaborators within Traverse, eliminating the need to download, email, and individually track content outside of the application.
- Clients, providers, or other external collaborators then use any device, wherever they are, to create a secure account to access the portal and interact with the content that's been shared.
- Collaborators can view documents, sign forms, and upload case documentation to be automatically added to the electronic case file in Traverse once verified by a worker.

Beyond empowering collaboration, this process also helps the agency keep client information safe. “With Traverse, it's all in the system of record automatically. This means that we're not saving anything to the desktop of the worker. If a laptop is stolen or it crashes, there's not client data that is stored somewhere else or accessible to an unintended recipient,” Katie said.

Results

Katie says Traverse Connect is helping Scott County HHS staff maximize their time and minimize their efforts.

“This is the best of both worlds. This helps give them back time to other work with clients versus the administrative task of mailing out signature requests one after another.”

— KATIE ELLERAAS

*Business Relationship Manager,
Scott County Health & Human Services*



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

QUICKLY COLLECTING CLIENT SIGNATURES

“Traverse Connect allows us to send an updated release to a client or guardian quickly. They can sign, send it back, and we can make the referral to a provider in a much quicker fashion, resting in the knowledge that we have the signatures we need in place to do the work without concern,” Katie said.

STREAMLINING COLLABORATION WITH PROVIDERS

The faster process with providers accelerates workers' ability to connect clients with services and support right away. “With Traverse Connect, we know we're getting the required signatures in the hands of the right provider instantaneously versus sending it through the mail and waiting on them to sign it and return it.”

EMPOWERING WORK FROM ANYWHERE

Traverse Connect provides flexibility for both caseworkers and clients. “Staff can work from anywhere, anytime, and families can sign from anywhere, anytime,” Katie said. “Life happens and there's time staff needs to work from home without office supplies right next to them. Families go on vacation without receiving mail at home. But that shared space in the Venn diagram of these two scenarios is that work can still be done expediently and safely and securely.”

DEMONSTRATING COMPLIANCE

Minnesota has very stringent rules and statutes on signature requests, signature request attempts, and documentation. It saves the agency time to be able to pull up an audit trail in Traverse Connect instead of sifting through workers' case notes. “Traverse Connect allows us to access signatures, requests, and other documentation, and gather them in one fell swoop versus multiple attempts across multiple platforms,” Katie said. “We have a running audit trail of signature requests that are sent, and that's helpful for our audits with the state and also our internal reviews.”

SECURITY MEETS CUSTOMER SERVICE

Most importantly, the agency can focus on making a meaningful impact on the community. “The safety that Traverse Connect offers leads to security, the securities in place now lead to efficiencies, the efficiencies lead to a quicker ability to respond, and enhance responsiveness leads to the best service that we can offer the families that we work with,” Katie said.



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