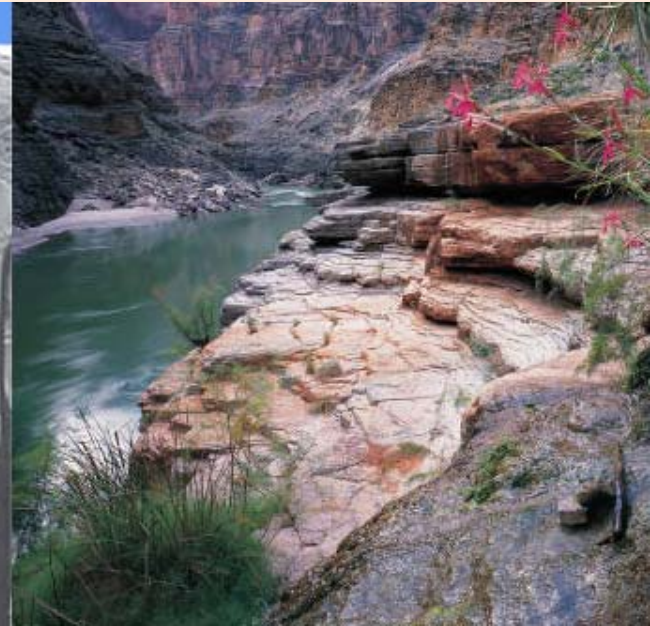


Mining for Gems: Case Management Software as a Supervision and Management Tool



The Equal Justice Conference
Phoenix, Arizona
May 2010



Introductions

- Thomas G. Bedall
 - Pro Seniors, Inc. Cincinnati, Ohio
- Steven McGarrity
 - Community Legal Aid Services. Akron, Ohio
- Eric Mittelstadt
 - Utah Legal Services. Salt Lake City, Utah

Workshop Objectives

- Introduce the draft form of MIE’s “Guide to Assessing Your Program’s Use of its CMS to Support High-Quality Supervision.”
- Obtain feedback on how programs use their CMS in supervision and suggestions for the guide.
- Demonstrate the use of “Crystal Reports” – one tool for pulling data from your CMS efficiently to support supervision and management.

Using a CMS for Supervision

- On demand access to client files.
- Remote Supervision
- Encouraging uniform maintenance and review
- Makes consulting on issues easy
- Meaningful comparisons to other advocates, and to best practices and standards
- Helps to analyze client demographics, staff efficiency, emerging trends for clients and for staff, outcomes for clients and compliance with regulations and funders

How do you use your CMS for supervision?

- Is it policy?
- Used by all supervisors?
- Used regularly and consistently?
- Are supervisors trained in all the bells & whistles?
- What works, what doesn't?
- *The MIE Guide is a tool to help you assess your strengths and challenges in using your CMS for supervision.*

The MIE CMS Guide

- The Process
- An Overview:
 - Overall Use in Supervision
 - Use in Intake
 - Use in Ongoing Cases
 - Use in Case Closures
 - Use in Staff Development and Evaluation
- Ratings and action plan sections with examples throughout.

Section by section review

- Overall use of a Case Management System in Supervision.
 - Focus of this section:
 - Have you developed policies that require the use of the CMS in supervision?
 - Have you provided supervisors the training, time and support they need to make good use of the CMS in supervision?
 - Sample Queries

Section by section review

- Use of the CMS in the Supervision of Intake
- Focus of this section:
 - Conflict Checks
 - Case Assignment
 - Data Entry Accuracy
 - Monitoring Intake Advice and Information
 - Monitoring Compliance with Intake Procedures
 - Sample Queries

Section by section review

- Use of the CMS in Ongoing Cases
 - Focus of this section:
 - The review of open cases.
 - Analyze and compare aggregated data
 - Expectations of supervisors to use the CMS in ongoing reviews of cases
 - Sample Queries

Use in Ongoing Supervision; an example.

The “Aging” Report

Case Num	Dopen	Dclose	Rc Snum	City	Off.	AGE
09E-2117365	6/23/2009		1371	Centerville	1	2
09E-2117547	6/25/2009		1371	West Valley	1	2
09E-2120688	8/11/2009		1371	Garland	1	1
09E-2119279	7/22/2009		1371	Spanish For	1	2
09E-2120375	8/6/2009		1371	West Jorda	1	1
09E-2118136	7/7/2009		1371	Layton	1	2
09E-2118158	7/7/2009		1371	Ephraim	1	2
09E-2121721	8/26/2009		1371	Salt Lake C	1	0
09E-2108574	2/12/2009		1371	Saratoga Sj	1	3
09E-2108302	8/5/2009		1371	Kearns	1	1
09E-2113691	7/9/2009		1371	Vernal	1	2
09E-2118254	7/7/2009		1371	Santaquin	1	2
09E-2118221	7/7/2009		1371	Bountiful	1	2
09E-2117457	6/26/2009		1371	Layton	1	2
09E-2108567	7/9/2009		1371	Layton	1	9
09E-2121307	8/20/2009		1371	Roy	1	1
09E-2108551	8/5/2009		1371	Ogden	1	1
09E-2115845	6/8/2009		1371	Ephraim	1	3
09E-2106167	1/9/2009		1371	Bountiful	1	3
09E-2106046	1/8/2009		1371	Moab	1	3
09E-2115113	8/6/2009		1371	Farmington	1	9
09E-2115861	6/2/2009		1371	Bountiful	1	3
09E-2108066	2/5/2009		1371	Moab	1	0
09E-2117177	6/22/2009		1371	Tooele	1	2
09E-2112612	4/17/2009		1371	Syracuse	1	3
09E-2117994	7/2/2009		1371	Ogden	1	2
09E-2116665	6/12/2009		1371	West Jorda	1	3

“My Clients”

Pc Opened	Case #	Next Activity	By	AGE	Hrs.	Fnd
75	10/15/2008	08E-2100887	develop case for hearing	7/3/2009	0	21.6 6E
74	8/7/2008	08E-2096407	prep for hearing	9/20/2009	0	14 6E
74	7/2/2008	08E-2094297	prep for hearing	7/11/2009	0	27.3 6E
74	8/7/2009	09E-2120396			0	8.8 6E
72	6/15/2009	09E-2116697	CH to fup	10/5/2009	0	6.4 21
71	6/4/2009	09E-2115966			2	0.8 21
74	7/15/2009	09E-2118857			1	3.4 6E
51	9/15/2009	09E-2123016			9	1.2 21
75	11/14/2006	06E-2058397	waiting for AC respons		2	93.6 21
74	8/6/2009	09E-2120308			0	2.8 6E
75	10/30/2008	08E-2102081	Close case	9/2/2009	0	9.8 24
75	9/10/2009	09E-1122707	SS/RECON/DISABILITY ISSUE: W/	12/2/2009	0	0.2 73
74	8/10/2009	09E-2120529			0	4 6E
78	9/4/2009	09E-2122387			0	1.7 21
51	8/25/2009	09E-2121669			0	1.8 21
76	4/23/2009	09E-1113077	Appt. w/pc on 5/26	6/30/2009	2	6.1 24
76	9/8/2009	09E-2122406			0	1.2 21
74	4/3/2009	09E-2111709	wait for decision on waiver request		0	8.9 21
51	8/14/2009	09E-2120917	Discuss with CH	9/24/2009	0	2.9 3E
74	8/20/2009	09E-2121378	Waiting for letter from PC	9/7/2009	0	1.4 3E
75	11/14/2008	08E-2102923	SS - ASSISTING WTH RECON APPI		0	7.1 73
72	8/10/2009	09E-2120496	Close case	9/30/2009	0	3.1 41
75	2/7/2007	07E-2063409	waiting for decision following persona	5/25/2009	0	54.9 21

Section by section review

- Use in Case Closings
 - Focus of this section:
 - Compliance with rules and regulations
 - Tracking grant requirements
 - Assessing quality of work provided
 - Sample Queries

Section by section review

- Use in Staff Development and Evaluation
- Focus of this section:
 - Individual vs. program average comparisons
 - Supervisor training
 - Regular data review with staff

 - Sample Queries

Use in Staff Evaluations and Development: Advocate Analysis

NO FILTER		Last 3 Months: 6/16/2009 to 9/15/2009		Last PPD included: 200917			
CASE TIME ANALYSIS - BY QUARTER							
Avg HrsPerWk		40		40			
% Case Time		65%		59%			
	LAST 3 MONTHS	3 - 6 MOS AGO		6 - 9 MOS AGO		9 - 12 MOS AGO	
10+ HRS : Number	6 4%	6 4%	4 2%	4 2%			
Avg. time	12.7 23%	16.4 28%	13.4 19%	14.2 19%			
5-10 HRS : Number	11 7%	15 9%	12 5%	12 5%			
Avg. time	7.4 24%	6.4 28%	6.9 29%	7.5 30%			
2-5 HRS : Number	35 23%	29 17%	24 11%	26 11%			
Avg. time	3.3 34%	3.1 26%	3.4 28%	3.4 29%			
1-2 HRS : Number	26 17%	19 11%	21 9%	23 10%			
Avg. time	1.4 11%	1.6 8%	1.4 10%	1.4 11%			
0.5-1 HR : Number	29 19%	31 18%	32 14%	30 13%			
Avg. time	0.7 6%	0.7 6%	0.7 8%	0.7 7%			
<0.5 HR : Number	43 29%	71 42%	135 59%	139 59%			
Avg. time	0.2 3%	0.2 4%	0.1 6%	0.1 5%			
TOTAL : Number	150	171	228	234			
Avg. time	2.3	2	1.3	1.3			
10 MOST ACTIVE CASES - LAST 3 MONTHS ONLY (5+ Hrs)						* means case is already closed	
17.1	Mcnece	10.2	Warenski				
15.8	Evans	9.3	Carter				
11.4	Banuelos	9.1	OCrowley				
11.4	Creer	8.8	Carlson				

Advocate Analysis (Bottom)

CASE S BY TYPE - LAST 3 MONTHS ONLY												
	CONSUMER		EMPLOYMENT		31/32		37		OTHER FAM		JUVENILE	
# of Cases	0	0%	0	0%	106	71%	39	26%	0	0%	3	2%
Time (hrs)	0	0%	0	0%	287.6	85%	49.4	15%	0	0%	1.7	1%
												OPENED
	HEALTH		HOUSING		INCOME MAINT		INDIV. RTS.		MISC/E DU			38
# of Cases	0	0%	0	0%	2	1%	0	0%	0	0%		CLOSED
Time (hrs)	0	0%	0	0%	0.2	0%	0	0%	0	0%		39

PROJECTS (top 9 below)	92.2	4	BREAK
65.7 OFF&GEN		0	
10.2 TIMEKPG		0	
6.4 CLINICS		0	
6 DOMTASK		0	

24	Sick leave
48	Vacation
72	Total paid leave
0	Comp earned
0	Comp taken

Your feedback and examples are needed!

- Please complete the survey
- Contact Andrea Zigman at

andreazigman@fuse.net

Transition to the Specific and Objective

- What “Crystal Reports” can do for you.