Maximizing Efficiency: Web-Based Case Management

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June 2013
HECM Roundtable

Welcome

Agenda

- Establishing Need & Determining Impact
- Assessing Risk & Establishing Guidelines
- Training and implementation
- Tailoring of System
- Life of Report
- Pros & Cons – Lessons Learned at UC Berkeley
- Working Towards a Proactive Approach
- Q & A

Establishing Need & Determining Impact

- Why do you have a tracking system? The concept of thorough record keeping and the support for it.

- Assessment of your current process
  - What is working? What is not working? Identifying areas for improvement and maximizing your added values.

- Assessment of Impact
  - How is your current process impacting your work? The work of others? The importance of having the information you need to make decisions.
  - How will this impact your workload? Considering the influx in referrals with current staffing.
  - How will your referrers respond to a change in intake? Considering your audience through a transition.

Assessing Risk & Establishing Guidelines

- Operating with an objective risk rubric
  - Selecting your rubric and training your Student of Concern Committee (SOCC) or Behavioral Intervention Teams (BIT)
- Consistency
  - Terminology
  - Central Intake Person
- What is a student record and how is created?
  - Student rights
- Information Sharing
  - Who should know?
- Escalation to threat assessment teams

Training and Implementation

- Determine and Communicate Roles/Responsibilities
  - Technical/Troubleshoot Contact
  - Intake Liaison
  - Care Manager
  - Other Staff involved with SOCC
- Determine Process
  - What is your response time?
  - Who should have access to what?
  - What are your follow up protocols?
- Transition Plan
  - Establish Timeline
  - Identify people to be trained
  - Review training materials provided by company
  - Develop training materials that are tailored to your trainees
  - Make materials available on the web
  - REINFORCE , REINFORCE, REINFORCE!

Tailoring of System

- Public Forms vs. Internal Forms
- New Report Notifications
- Editing the Information before it becomes a part of the student's record
- Incorporating Your Risk Rubric
- Different Tabs
- Care Actions
- Letter Templates and Letter Tracking
- Access Rights

Life of a Report

Report is submitted through public form

Report is reviewed by intake liaison

If report meets acceptance criteria, it is assigned to Care Manager for evaluation

If no action is needed, care report is filed as an FYI. If intervention is needed, Care manager gathers additional information and discusses case with SOCC

Care Manager grants individual access to the report for staff with action items

Assigned staff member completes their actions and updates the report accordingly

Care Manager reviews the case and the updates. If the intervention is complete, case is resolved.

UC Berkeley/ Pros & Cons

Pros

- Having a secure system to store and track information
- Ability to give and remove access for each individual case
- Allows staff and faculty submit care report online
- Being able to not be glued to the phone all day
- Quick assessment

Cons

- So many functions it takes a while to learn & train the team to use.
- Online reporting only may seem less personal (depends on your campus culture.)
- Ability to merge reports
- Currently there is no function to alert you to check in on a student in the future

Working Towards a Proactive Approach

- Moving from excel to database: TIME
- Assessing the types of reports being submitted
- Assessing referrals through the lens of student demographics
- Assessing referral sources
- Assessing the time of year reports are increasing and why

Q & A