



SUBMISSION FORM

All submission forms must include the following information. Separate submission forms must be turned in for each eligible program. **Deadline: July 1, 2023.** Please include this submission form with the electronic entry. If you do not receive an email confirming receipt of your entry within 3 days of submission, please contact [Gage Harter](#).

PROGRAM INFORMATION

County: Chesterfield County

Program Title: CSA Case Management Application

Program Category: Information Technology

CONTACT INFORMATION

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SIGNATURE OF COUNTY ADMINISTRATOR OR DEPUTY/ASSISTANT COUNTY ADMINISTRATOR

Name: Joseph P. Casey, Ph.D.

Title: County Administrator

Signature: Joseph P. Casey, Ph.D.

Digitally signed by Joseph P. Casey, Ph.D.
DN: cn=Joseph P. Casey, Ph.D., o=Chesterfield County, ou=County Administration,
email=caseyjoe@chesterfield.gov, c=US
Date: 2023.06.27 12:18:26 -04'00'

Chesterfield Child Services Act Case Management System

Executive Summary /Press Overview of the Program

The Chesterfield County IST Department working in partnership with the Chesterfield County Social Services / Child Services Act (CSA) Department developed and implemented a cloud hosted case management (CM application) system to replace lagging technology. The CM application developed on Microsoft Power Platform provides automation support for all aspects of delivering services for the CSA team including managing individual cases, financial management, vendor management and enhanced dashboards and reporting. Using the CM application, the CSA team has eliminated the paper-driven processes for team coordination with case workers from 2 jurisdictions and 7 organizations.

The CM application is used to deliver family-focused, child-centered managed services to meet the needs of children and young adults and their families in Chesterfield County and the City of Colonial Heights. In the first six months in production, over 500 meetings had been conducted with over 1,200 vendor services all coordinated electronically using the CM application.



Program Description

Chesterfield's Children's Services Act (CSA) is the local office to Virginia's Children's Services Act (CSA), a state and local interagency mandated program that provides needed services to children and families in the community and comprises the Family Assessment Planning Teams (FAPT) to authorize an array of services to children and families in the community, providing services funded through CSA state pool funds.

- Administer the CSA process for both Chesterfield and Colonial Heights
- Keep children within or return them to the community and families, with services that are child centered, family focused and locally based
- Formulate treatment plans collaboratively, including the child, family and personnel from referring agencies and the Family Assessment and Planning Teams (FAPT)
- Contract with local providers in the community to deliver services to children and families
- Review services and treatment plans regularly through FAPT meetings to establish the continued need of the services being provided

The Problem

The Social Services CSA team was at a crossroads with the lagging technology being used to provide case management. Chesterfield County seized the opportunity to custom-build a solution to meet the demand of the business team with the ability to scale and grow for the social services department.

While moving off of the lagging technology before the solution was retired by the vendor was a key driver, the list of primary objectives and the problems, challenges that emerged when defining the needs included:

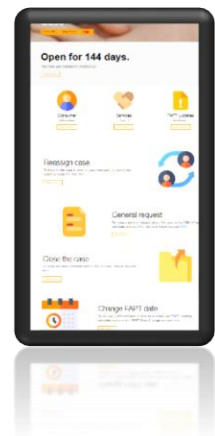
- 1. Eliminate lagging technology and reduce on-premises footprint:** Lagging solution versioning and platform required a technology refresh, optimally, reduce the on-premises footprint.
- 2. Streamline Cooperative Case Management:** Supporting 2 jurisdictions and case workers from 7 organizations, many processes relied on multiple paper forms and documents attached to emails between external case workers and the CSA core team; this converted to exponential back and forth email communications. Manual notifications and reminders were manually created for each case to ensure all required information was collected. Emailed requests of a list of purchase orders requiring approval. Duplicate data entry was required from one stage to another between social services teams.
- 3. Deliver an intuitive and easy to onboard new users:** Addition of new staff or changes in the case manager role yielded the need for an intuitive, workflow driven solution to easily guide new case workers, or CSA team members, step-by-step, through the new and or emergency case referral and management.
- 4. Empower Business Self-Serve, Configuration Capabilities:** The business team desired more direct ability to manage updating certain values, like updated state codes for services; funding code changes; providing new user logins for case managers without the IT involvement creating new accounts; adding or updating codes to meet state requirements; personalized dashboards and views.
- 5. Provide an agile, cost effective, scalable solution:** The legacy system was costly to upgrade, and ongoing maintenance and licensing fees continue to increase with limited increase in functionality. Initial research yielded solutions that, while designed for the niche social services case management, were costly to implement, maintain and were cost prohibitive regarding customization and integrations. Leveraging the initial investment in the platform and the user licenses, Social Services is positioned to further refine service delivery, fold into the platform

other solutions for other social service processes, leverage the ability to create dashboards and make use of and benefit from the out of the box data analytics.

The Solution

Chesterfield County IST Application Development encouraged the adoption of the Microsoft Power Platform for the solution to meet the defined objectives. The IST team and Social Services team members collaborated to design and deliver the CSA CM application at the beginning of the 2023 Fiscal Year. The initial release was completed in two phases, with the following key components as part of the comprehensive solution that directly respond to the objectives that had been defined:

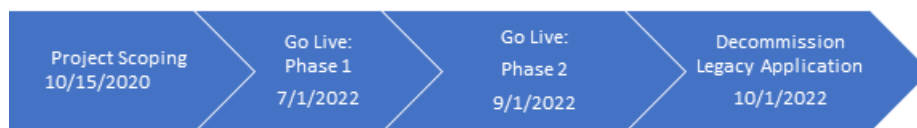
- **Cloud based, Microsoft Power Platform, model driven solution, hosted on Azure and** employs tools on the MS Power platform including: MS Dataverse for cloud-base, secure data storage on Azure as the backbone, MS Power Pages (portal), Power BI for reporting from the CM Application and also pulling from other social services data sources for a single view of the data. Business Flow Automation and Power Automate. We also used Azure ADF pipeline for integration and moving data between systems.
- **Case Worker Management Portal** workers provide secure, web-portal access, available 24/7 using the Microsoft Power Platform Power Pages. The functionality supports creating and submitting a referral, view cases, request an action on case with required details needed for the CSA to immediate take an action. Gives notifications of upcoming meetings, a workflow for required case updates with a due date.



- **Business Process Automation** were created with guidance from CSA business team for key step-by-step, rule driven workflows which reduce errors, streamline and automate repeatable tasks. Primary workflows include: Referral/Intake, case management, FAPT meeting management, case vendor service authorization and vendor purchase order management and purchase order payment processes.
- **Business self-help for updating codes and state fund information and rules** was built in to support changes or additions. For example, this fiscal year the state CSA office introduced new categories or types of service classification; also updated the rules for some state funding. In the past, this would have required a statement of work for the application vendor, or other IT resources. However, for this example, the CSA team member added the new information and created the new codes and associates independently. The appointed CSA team member also has the capability of creating accounts for new case workers significantly reducing the time to onboard a new case worker.

In the first six months in production, over 500 meetings had been conducted with over 1,200 vendor services all coordinated electronically using the CM application.

Implementation



In October 2020 the project scoping initiated; user stories created; and a Microsoft Power Platform development consultant was engaged to initiate design and build process. Over the next year, analysis of current processes versus future state ensued. In February 2021 the project was adjusted to include more of a waterfall delivery which best suited the project team. The Chesterfield County Information

System Technology (IST) core team consisted of 1 Project Manager, 1 Business Analyst and 2 IST senior Microsoft power platform application developers; the Social Services CSA case administrators and

Basic Timeline:

- October 15, 2020
Project scoping initiated; determination regarding solution
- July 1, 2022 Go Live Phase 1
CM Application Portal for case managers and CSA case administrators.
- Sept 1, 2022 Go Live Phase 2
Financial Management for PO and Invoice Processing; allowing for closing out and final state reporting for the FY21.
- October 1, 2022 Decommissioned Legacy Application

finance team were fundamental as subject matter experts. Supporting IST resources were utilized for specific efforts, such as a data engineer, and database administrators for data migration and support of the accounting system integration.

Cost

Most of the cost for the MS Power Platform and Azure were absorbed as part of the IST technology core infrastructure. Initial consultant fees were from \$7-\$10K to create the foundational platform environment and MS Dataverse for data storage on Azure in each environment and initiate the MS power pages (portal).

Annual costs incurred by the business is approx. \$5,000.00 per year for the user Premium Microsoft Power Platform licensing; *to note, which can be further leveraged for any other solution added to the platform for the business team.*

Supplemental Materials:

Figure 1: CSA Case administrator Dashboard: Users can set up analytic dashboard to provide actionable or useful information and insights at-a-glance.

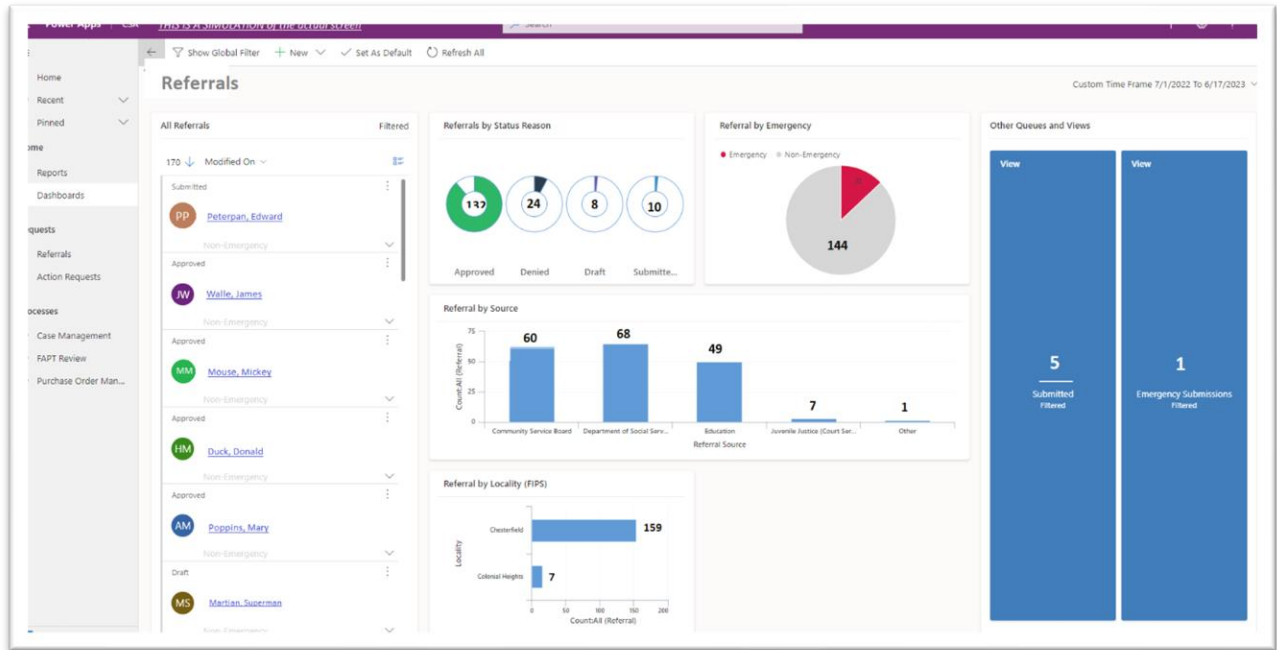
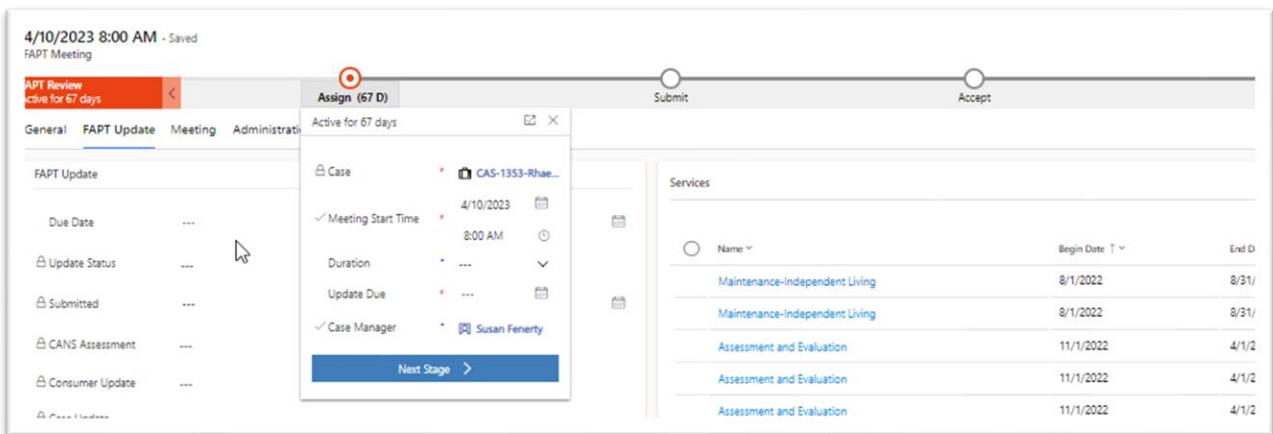


Figure 2: Sample Business Process flow automation: FAPT Meeting



Example: FAPT Meeting business automated workflow streamlines a complex and collaborative process between agencies. In the first step, the meeting is schedule, and a deadline is set for case manager to update the case; an automated record is created on the portal for the case manager to complete and submit; this moves the process along. The CSA administrator reviews the updated information and accepts it to move to the next planning; the meeting step automates attendance and provides a place to capture results and generate the IFSP or the official service plan document. The final step schedules the next meeting and moves the services to the finance team for processing.

Figure 3: Sample Case worker portal screens. Functionality provides 24/7 ability to provide updates, submit referrals, provide the case updates. Streamlines collaborative case management.

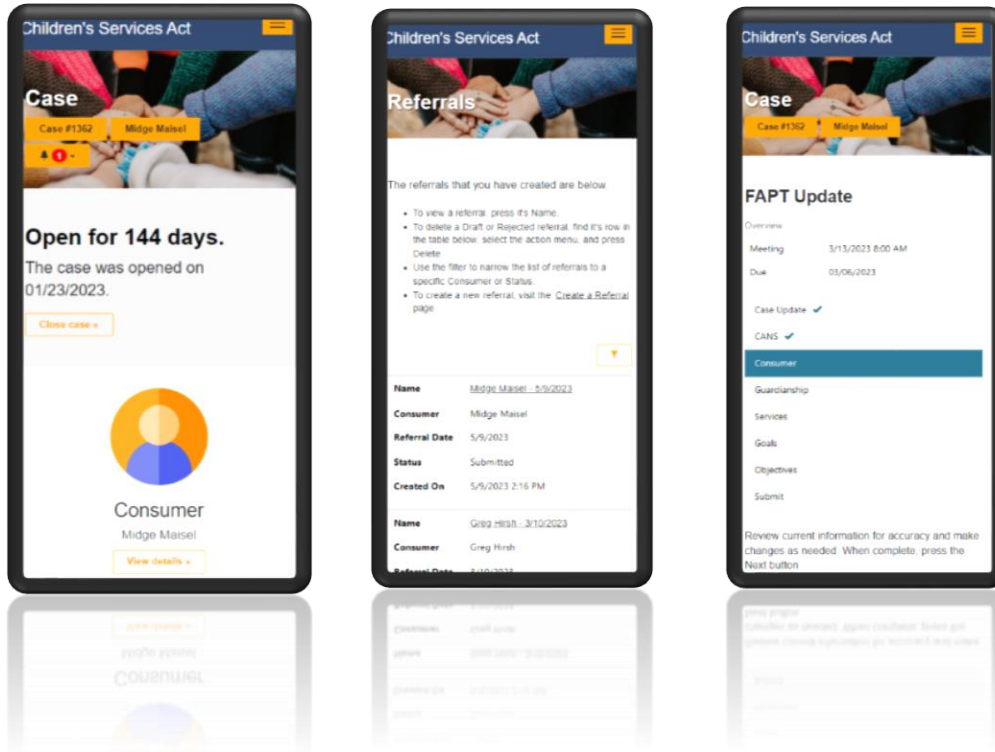


Figure 4: Sample Reporting and User Create Views

