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The Human Side of Change

The Human Side of Change

- Technology succeeds only when there is recognition that its users (and beneficiaries) are human

Today's Presentation

- Texas Adult Protective Services Tablet PC solution
- How APS managed the cultural change
- What worked?
- What did not work
- Lessons learned
- Future considerations

Background

Texas Adult Protective Services Program

- Abuse, Neglect & Exploitation Investigations
- Elderly and Disabled
- In homes and facilities
- 90,000 Investigations in FY07
- 600+ investigators in 156 offices across Texas
- 254 counties

APS Reform



- Governor's Executive Order in 2004 based on serious quality findings
- Top to bottom review by HHS Commission and Office of Inspector General
- 252 corrective actions
- Tablet PC solution

The Way it Was

- Electronic windows-based client case management system (IMPACT)
- Intakes routed to caseworker through desktop email
- Look up address on internet at office
- Written notes during investigation; documentation occurred later in office
- Consultation with supervisor in office
- One camera available per office



Why Tablet PC's?

- **Reduce the documentation**
burden to achieve manageable workloads
- More **timely and accurate** supervisory and quality reviews because documentation is completed in real time closer to the time of contact
- **Client outcomes improve** through effective assessments and documentation (example: sharing digital pictures from the field with supervisors)
- The boundary between field and office is eliminated; caseworkers have **access to information, resources and support from anywhere**





Tablet PC Solution

- Electronic notepad
- Handwriting recognition
- Pen used as a mouse
- Voice recording/recognition
- Wireless Access
- Digital Photography
- Streets and Trips for daily routes and locating driving directions
- Portable keyboard and mouse as option for use
- Docking station for office use

The Mobile Caseworker

- Mobile caseworker = Using Tablet in the client's home
- Workers would return to office to consult and document
- Focus on improving quality of investigations and timeliness of documentation

Phase One - Development

- One Year for Rollout of Tablets
- Program and IT Liaisons
- Caseworker focus groups
- Caseworkers involved in design & testing
- Contractors shadowed caseworkers
- Pilots with hardware (tablet) tools
- Demonstrations in local offices
- APS Tablet PC Intranet Page
- Emails cascaded through chain of command

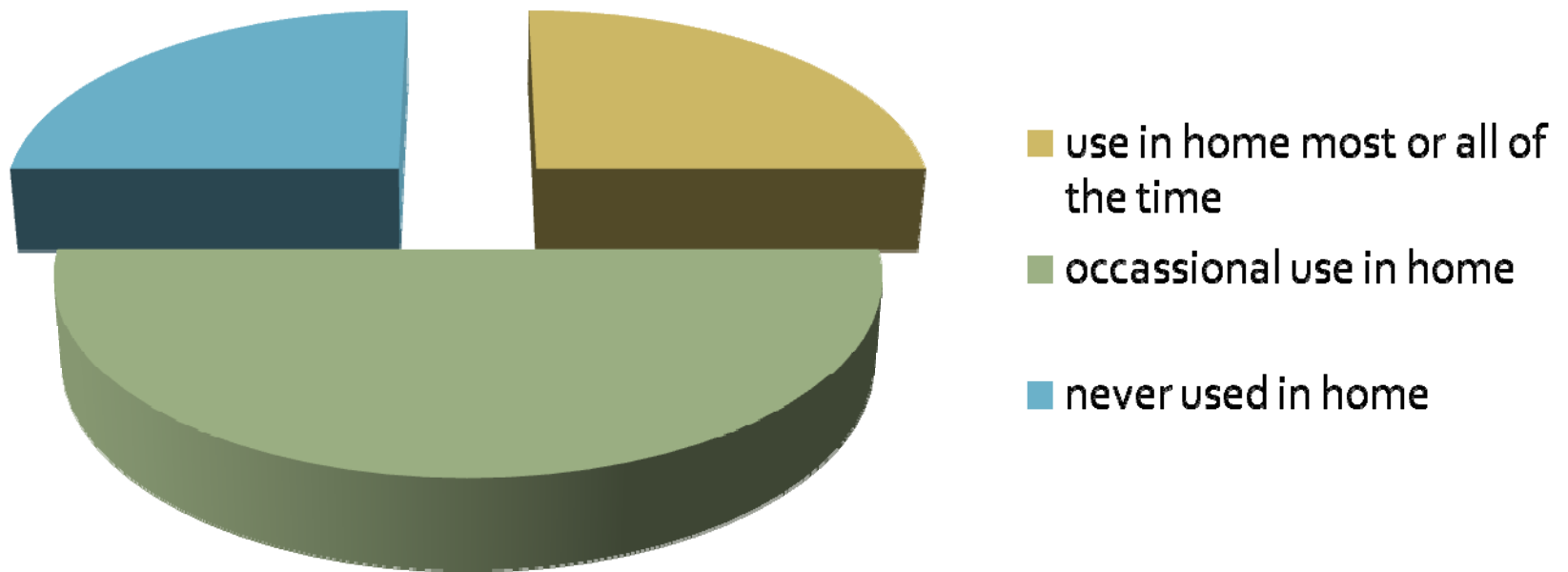


Phase Two - Deployment

- September through November
- 600+ caseworkers
- 2 ½ day trainings in the field (20 per class)
- Team of IT, trainers, pilot participants and vendors
- supervisors included in training
- Central Help Desk
- Intranet Q&A; tips and troubleshooting
- Embedded in new caseworker training

What We Found

Caseworker Survey After 1 to 4 months use



What We Found

Caseworker survey (after 1 - 4 months use)

- 10% reported using handwriting recognition
- 10% reported using voice recognition
- 50% requested additional training

What We Found

- Of those using some or all of the time in the home, most reported increased efficiency with documentation time
- Time from investigation to complete documentation had not decreased
- Percent of cases pending (backlog) had not decreased
- Generational and tenure issues
- Accessibility and mobility issues

What Did We Do?

- Fixed technical problems
- Remedial training
- Super skilled users
- Maintained Help Desk
- Online Blog for tips and tricks
- Added to “realistic job preview”
- Paid overtime to clear up backlog
- Mandated use in home
- Time and practice help

What Worked

- Involvement of caseworkers in design, testing and piloting
- Extensive communication prior to, during and after release
- Dedicated APS Liaison between IT and Field
- Thorough training on Tablet PCs and accessories
- Supervisors included in training
- Post deployment survey and immediate remediation of problems
- Leadership and commitment from the top is key

Lessons Learned

- Clearly lay out expectations for usage
- Plan for remedial training
- Need to train workers and supervisors on how to operate in mobile environment
- Did not adequately predict ongoing, increased need for IT support

Lessons Learned

- Application design must consider expected usage pattern of device
- Tendency to “pave the cowpath”
- Technology changed work processes and required training on new skills
- Expect there will be emerging issues that were not anticipated as work processes change

What's Next

- Pilot projects to move beyond mobile to completely office-free
- Identify training needs for working in a office-free environment
 - Caseworkers
 - Supervisors
- Expansion of mobile hardware/tools to better support mobile and office-free field work
- Redesign business applications to support mobile and office-free use