



# HOW ELECTRONIC CASE FILES HELP CASEWORKERS PUT FAMILIES FIRST

## A CASE STUDY

Mesa County Department of Human Services

Since implementing **Traverse®**—cloud-based software that manages electronic case files—child welfare caseworkers at Mesa County Department of Human Services (DHS) can effectively telework and more efficiently work with families to reduce trauma and achieve permanency.



### Challenges

- Caseworkers needed a way to mine data and surface case history
- Caseworkers strived to better balance their time to improve outcomes
- Existing electronic filing systems can't keep up with complex families or cases
- Previous system lacked mobile access to case files and forms
- COVID-19 forced staff to transition to telework in less than 24 hour

### Results & Benefits

- Easily collect and view documents, forms, and case history
- Leverage a data connection to Trails to facilitate digital forms completed with families for faster referrals
- Holistic view of cases and data mining to make safety and permanency decisions
- Provide timely services and identify natural supports for at-risk families
- Enable telework for 100% remote staff during pandemic

“ During the pandemic a permanency worker told me ‘I don’t know what I would do right now working from home without Traverse.’ ”

— HANNAH WEBSTER  
Child Welfare Manager



## The Solution: Traverse

Mesa County DHS partnered with Northwoods to start using Traverse in January 2020. The systematic change was possible thanks to the hard work of Tracey Garchar, Director of Department of Human Services, to implement the enterprise solution into the agency and pave the way for other counties in Colorado.

Integrated with the state case management system Trails, the cloud-based software helps caseworkers easily and quickly collect and retrieve case information, while accessing electronic case files from anywhere—the agency, their homes, in court, or clients’ homes. They can search by keyword, person, or topic to find documents, photos, or people related to the case in minutes rather than hours. They can also complete digital forms with clients to complete releases of information and refer them to services faster.

All of this was critical in March 2020 when caseworkers were sent home overnight to telework during the COVID-19 pandemic.

“We’re being mindful and aware of our community and our public interaction. When you can get as much as you can done in one interaction—signatures, forms filled out, information shared, pictures taken—and then go back to your home setting has really felt good to caseworkers to be that effective with one visit instead of the multiple back and forth,” said Hannah Webster, Child Welfare Manager.

Beyond supporting telework, Traverse also provides a more complete picture of a family’s past to safeguard their future. Access to this history, both the strengths and areas of concern, helps caseworkers find natural supports and mitigate risk in the home, which reduces the need for out-of-home placement.

In line with the Family First Prevention Services Act, Mesa County DHS strives to use evidence-based prevention and intervention services to support well-being and safety for families. That also helps the agency better manage finances, resources, and workloads.

“We’re really trying to work with families at the lowest level of intervention possible. I think Traverse having the historical information and all the family’s history a lot more accessible helps make more informed decisions for the safety of the children,” said Webster.

The result is improved balance for workers, who are repurposing time to connect with families and take care of themselves while doing a stressful job during a stressful time.

“When some of our administrative work can be done right there with families, there’s more conversations that can be had, there’s more brainstorming in regard to solutions with families, and that’s where our caseworkers want to be,” said Kellerby.

## Positive Stories from Caseworkers

Mesa County DHS' long-term goals for Traverse are to help caseworkers make real-time decisions, deploy services that keep kids in their homes, and achieve timely permanency and better outcomes for families. After just six months, and during a global pandemic, those goals are already being realized.



### CHASE SIMS-EKREM Achieving Permanency and Putting Families First

Chase Sims-Ekrem, Social Caseworker II, estimates Traverse saves her 6-10 hours every week because she can upload and find documents in minutes instead of the hours it took her before. But Traverse is yielding a much more important benefit for her: time to focus on families.

“ Flipping through a paper file or trying to go through other databases to find one name associated with a child would be virtually impossible.

I was able to locate extended family for a child who was really struggling with behaviors and unable to be stabilized in any local placements. Traverse helped me find and locate an extended family member who had previously had a minor relationship with the child. It allowed me to find their contact information, reach out to them, and end up placing the child in their care.

This job is about cultivating human connection and Traverse has let me do that and do it more authentically. It let me put families first and not the paperwork, not the bureaucracy, not the tiny to-do list. I can put families first. ”



### ERICKA SEBRING Data Mining and Finding Natural Supports

Traverse enables Ericka Sebring, Social Caseworker II, to focus 70% of her time on families and 30% on paperwork when doing assessments. Before, it was the opposite. She can surface current and historic case information, such as medical reports or police reports, to help make better safety decisions for kids when opening a case or removing a child from a home.

“ It has saved a ton of time when it comes to data mining. Being able to dig back through, click on something, and learn some information from it has been really beneficial when it comes to determining whether we have enough concern that we need to open a case or we've already taken enough steps to back off based on patterns in the family.

When I was sitting down with a family and they were struggling to identify some supports, I was able to look through the family's history and bring up a couple of people that could help. It helped open the family's eyes to their own natural supports that they may have not even realized existed. I helped them solve their own problem and removed that barrier in a way that was more humanizing. ”



### JENNIFER GRESS Understanding Case History for Child Studies

Jennifer Gress, Senior Case Manager, used to struggle to understand a child's entire history—medical information, assessments, medical history, reason for removal—when helping families adopt a child from foster care. With Traverse, she accesses needed historical information in minutes, not days, to write child studies and court reports.

“ The biggest challenge I faced was when I was writing child studies. Finding all of the information could be challenging, especially finding medical background.

I can go into Traverse and I can search by type of information or keywords. Being able to search for what I need in Traverse has been very helpful in writing child studies. The best feature of Traverse for me is that I can convert a picture to text so I can copy and paste information and not retyping for a court report or child study. That's a critical aspect of Traverse that has really impacted my ability to do my job in a timely manner. ”

“What we’ve seen with the pandemic is we were able to effectively move our workforce out of the building, into their homes, and ultimately didn’t miss a beat.”

— JOE KELLERBY  
Director of Child Welfare



## Trusted Technology Partner During COVID-19

Mesa County DHS leadership had no way of knowing the pandemic was coming when they first decided to bring in Traverse in 2018. Fortunately, when choosing a technology vendor, leadership prioritized finding a trusted partner with expertise in not only building quality software, but an understanding of child welfare and long-term commitment to customers.

Here’s a brief overview of how that decision has paid off.

On March 16, 2020, Mesa County DHS staff were fully operational in their physical office. Less than 24 hours later, all 100 caseworkers were fully remote because of COVID-19 shutdowns. Thanks to Traverse, frontline caseworkers had essential technology and ongoing support from Northwoods to telework without jeopardizing services to families.

“What we’ve seen with the pandemic is we were able to effectively move our workforce out of the building, into their homes, and ultimately didn’t miss a beat,” said Kellerby.

### Technology for Telework

A key benefit of Traverse during the pandemic, or any crisis that displaces caseworkers, was having electronic case files available to anyone in the agency, regardless of location.

“I don’t think we would have been very effective without Traverse. We can keep our case files uploaded and available to other individuals almost instantaneously. When one of us isn’t available, someone can step in and make real-time decisions that impact the family and help us achieve permanency faster,” said Sims-Ekrem.

Digital forms that caseworkers can complete without leaving home have been essential throughout the agency.

“The handoff feature has come in super handy, especially during a pandemic and working remotely. I can just send a form directly to my supervisor and she can sign it and send it back to me. That’s another feature that’s made Traverse a lifesaver through this whole global pandemic.”

— ERICKA SEBRING  
Social Caseworker II

Also, the agency can make sure forms are consistent and up to date.

For example, soon after the initial shutdowns, Mesa County DHS changed drug screening companies, which required switching authorization forms. Kellerby said Northwoods created the new form and it was added to the system within 24 hours. Caseworkers could immediately access the updated form in Traverse and any concerns about substance abuse could be dealt with quickly.



## WHY NORTHWOODS?



“

It truly felt like Traverse was built by people who worked in the system to say, 'there's got to be something better out there that will have a positive impact on caseworkers working with families.' It's built for people in child welfare. Post-training has been great, even with the pandemic. There's been availability, phone calls, and video calls.

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— JOE KELLERBY  
Director of Child Welfare

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I think Northwoods' commitment level to establishing the relationship up front, maintaining the communication, being extremely available and supportive throughout this process has made a world of difference.

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— HANNAH WEBSTER  
Child Welfare Manager

### About Traverse

Caseworkers use Traverse to efficiently collect, retrieve, and share electronic case content from anywhere.

Learn more:  
[teamnorthwoods.com/products/traverse](https://teamnorthwoods.com/products/traverse)

### About Northwoods

We develop high-tech software solutions for adult & aging, child support, child welfare, and economic assistance.

Learn more:  
[teamnorthwoods.com](https://teamnorthwoods.com)



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