

PerfectForms Success Story: State of Oregon - Office of the Long Term Care Ombudsman

EXECUTIVE SUMMARY

CUSTOMER NAME

- State of Oregon -
Office of the Long Term
Care Ombudsman (LTCO)

INDUSTRY

- Government

BUSINESS CHALLENGE

- Convert a paper-based,
case reporting process to
an online system
- Reduce case processing
time
- Improve case reporting
accuracy

PERFECTFORMS SOLUTION

- Replaced paper-based
process with
PerfectForms
- Reduced case processing
time dramatically
- Improved case reporting
accuracy by 500%
- Reduce training time by
25%

BUSINESS CHALLENGE

[Oregon's Office of the Long Term Care Ombudsman Program](#) (LTCO) is charged by statute to investigate problems and complaints at nursing homes, assisted living facilities and adult care homes, and to advocate on behalf of residents to improve their quality of life and quality of care. Currently, more than 150 trained and Certified Ombudsmen Volunteers are tasked with investigating and resolving complaints at nearly 2,500 long-term care facilities, and working with agency staff to report results to state and federal authorities. Volunteers perform 75% of the complaint investigation and resolution.

Volunteers formerly relied on an expensive paper-based process for tracking complaints and resolutions wherein they would record cases on carbonized, legal-size forms. The forms would later be delivered to agency support staff to be manually entered into the Federal database. The lack of consistency in the use of 132 codes printed on the back of these forms contributed to a complex and potentially error-prone process. Processing paper forms could produce as much as a two month lag between identification of a complaint and staff reviews of the action. Not to mention, new rules and changes to protocol are constant, making it impossible to keep the paper forms up to date.

Using Web-based "smart forms" from PerfectForms makes entering, submitting and reporting much quicker and reduces errors by implementing drop-down menus and check boxes that only allow for an appropriate combination of codes to be selected. Moreover, the electronic process provides ombudsmen with a better understanding of the codes they choose as full definitions are now only a mouse click away. In addition to the benefits for volunteers, the new system lets agency staff access data easily using automated reports that provide insight into things like open cases, most active volunteers or most frequent complaints.

"Replacing paper forms with an electronic process has saved time and simplified tasks, but more importantly, this transition directly supports our volunteers by making their workload easier so they can focus on advocacy rather than paperwork."

-Mary Jaeger, Oregon State Long Term Care Ombudsman

FORM AND WORKFLOW SOLUTION

LTCO began investigating low-cost options and in December 2009 discovered PerfectForms. In a few short weeks, they had developed an online form and automated the workflow behind it, and began piloting the process in three of Oregon's counties. Now, over a year later, the program has been rolled-out statewide. The new system – which meets all state and federal guidelines for security and privacy – will cost the state less than \$1,500 annually and can be maintained on an ongoing basis by agency staff.

BUSINESS RESULTS

After over a year of use, state-wide, for case reporting and tracking of volunteer activities, LTCO has seen excellent results:

- **Reduced Use of Paper:** LTCO has cut the use of paper forms by 2/3 in the first year alone. Additionally, with new rules and protocols changing constantly, keeping paper forms up to date was very problematic. It could take as long as 6 months or more for a change to be designed, approved, and printed. Now changes to the case report forms require about 5 minutes and are immediately available online.
- **Decreased Case Processing Time:** Since volunteers no longer have to mail case submissions and agency staff no longer have to manually route forms for review, the case processing time has reduced dramatically. With electronic reporting, volunteers are also more willing to report complaints. The average complaints per volunteer and average complaints per case have increased 15% since PerfectForms was introduced, ensuring investigation of more issues and complaints confounding residents in long-term care.
- **Reduced Errors:** Volunteer reporting accuracy has improved by 500% with the introduction of PerfectForms. Volunteers can quickly find the reporting codes applicable to the particular situation with keyword look-ups. All code definitions are readily accessible and edit checks are in place to catch errors immediately. Additionally, data accuracy has increased because the staff doesn't have to decipher smudged and ambiguous entries on a yellow carbon copy form.
- **Enhanced Training:** LTCO staff previously spent up to 4 hours training volunteers on case reporting. With the new online tutorials and proficiency tests created with PerfectForms, the training time on the mechanics of reporting has been reduced to less than an hour. Volunteers can also complete training modules from the comfort of their own home since it is hosted online.
- **Increased Volunteer Satisfaction:** Removing the challenges associated with the paper-based process seems to be well received by volunteers. In surveys, 99% of volunteers report high satisfaction with the new system created with PerfectForms.
- **Improved Scalability:** The number of volunteers is currently up 30%. With the new PerfectForms system, the existing 6 person professional staff is able to effectively support the increased volume of case reports. LTCO cannot achieve their advocacy mission without the support of volunteer ombudsmen.