

CASE STUDY

Laurel House adopts case management solution to improve continuum of care and service





[Laurel House](#) is a comprehensive domestic violence nonprofit agency that has served individuals, families, and communities throughout Montgomery County, Pennsylvania, for over 40 years. They are dedicated to the vision of ending domestic violence in each life, home, and community.

Laurel House's mission is to advocate for and empower those impacted by domestic violence by providing crisis intervention, safe haven, supportive programs, and resources. They also advance social change through preventative education, community training, and collaboration to foster a coordinated response to domestic abuse.

In addition to an emergency shelter, Laurel House offers a 24-hour hotline, a text line, transitional housing, a children's program, individual and group counseling, medical advocacy, legal representation and advocacy, crisis response, law enforcement collaboration, as well as community education, and prevention efforts. Their services and programs extend through five sites, two apartment buildings, and two thrift shops.

Challenges



FUTURE LIMITATIONS

With their previous case management software, Laurel House could only count hours and services. As they grew, they found it wasn't enough. A system was needed to help track and report the various services and programs they offer survivors, such as financial support in the form of gift cards and food items, as well as relocation funds and rental assistance.

COMMUNICATION AND DUPLICATION ISSUES

The previous case management software system could not support the sophistication of programs that Laurel House needed to expand. They needed a solution that would minimize duplication of records which tied up valuable staff time. In addition, they needed a way to better improve communication across all of their programs and sites.

DIFFICULTY OF USE

Laurel House's prior case management software was arduous to navigate when it came to inputting data, impairing the continuum of care. Staff had to list survivors by numbers and not names, presenting a logistical and time consuming challenge when looking up a specific survivor in the future.

The site only allowed staff to enter extremely limited information, preventing them from expanding on discussions held, services offered to a survivor, or what their concerns may have been. Staff could not record abusers, nor connect people via household. With this lack of comprehensive data in case notes, there was no way to track what was discussed or to know what needed to be addressed with a survivor the next time contact was made.

Another time-consuming issue that challenged staff was the inability to see at a glance, on the dashboard, the date of last services provided a specific survivor. To find that information, staff had to click on a service and scroll through a page or two. The site was difficult to use, lacking the key feature of being able to see all data on the same screen at one time, making communication extremely challenging.

Solutions and impact

According to Stacy Dougherty, deputy director of Laurel House, “Our previous case management software was a nightmare. And then we switched to Bonterra Program Management (formerly Social Solutions) Case Management solution, and it was a huge night and day change.” There are many ways they now take advantage of this new case management solution.

EASE IN CUSTOMIZATION AND TRACKING

Laurel House now has comprehensive customization abilities. Unlike their previous case management software, they have the flexibility to easily adjust or create a form, giving them the data needed to generate reports that highlight their services and promote their organization.

For instance, a program manager can request specific data to demonstrate the impact of their programs on law enforcement or another local agency.

In addition, their current Bonterra Case Management solution allows them to track financial support given to survivors as well as grant funding.

Bonterra Case Management empowers Laurel House to effectively track referrals to counseling, the staff attorney, and other community resources. It also enables quick and efficient tracking of consent forms, helping them meet their confidentiality requirements.

Laurel House’s staff, including crisis responders, counselors, and shelter advocates, can all access, at different sites, case notes and electronic documents that are uploaded into the case management solution. When working with survivors who could have considerable trauma, this prevents staff from having to ask them to share their story multiple times with different staff. They can see from their case notes what the other staff has spoken about with a survivor, streamlining the process for all.

Additionally, through the Bonterra Case Management solution’s electronic documents, survivors can sign a consent form for staff to speak with a childcare agency, landlord, housing authority, or someone else on their behalf. Laurel House can upload these forms and easily view who they have permission to speak with, preventing staff from having to search for this information in various places and saving valuable time. As a result, staff communication is improved across Laurel House’s various programs.



EASE OF USE FOR STAFF

Staff wears many hats and their time is limited. Using case management software that is user-friendly supports staff to minimize administrative time to invest more with survivors. Melinda Himes, director of shelter and housing, said, “[We] have gotten good feedback from people that have worked with other data entry systems who have said this case management software is very user-friendly and easy to learn.”

MANAGEMENT TRACKING OF STAFF HOURS

Program managers can run reports which show direct service hours each staff member has provided to survivors. “From a management perspective, it is helpful to have so we can make sure that people are getting credit for the number of hours that they’re putting in and that they’re recording properly,” said Stacy.

EFFICIENCY FROM STREAMLINED DATA ENTRY

Bonterra Case Management streamlines documentation across the organization. For example, when a staff member takes a hotline call, the Case Management solution allows them to complete multiple tasks in a short time, such as open folders, start program and bed enrollments, and take case and service notes. Staff can easily verify that all necessary forms are completed.

The Bonterra Case Management solution also reminds staff to fill all forms in completely. If there is a missing field, staff won’t be able to save a document and a red asterisk will appear, pointing out that there is data that still needs to be entered. This is very helpful in that it prevents staff from saving forms that are incomplete and supports data integrity.

FAVORITE FEATURES

Laurel House uses the Bonterra Case Management solution in many ways across all of its programs, and several features have revolutionized its process. The folders feature enables staff to be able to see all data per person at one time. They can, also, now create and access abuser profiles, allowing staff to track key information when helping survivors and see who is attached to who and if an abuser profile has been mentioned before.

In addition, search features in Bonterra Case Management offer considerable ease for staff, who, when receiving a call on the hotline from a survivor, may only be told a first name and the abuser's first name. Being able to search and narrow this information even with only a general date of birth, can help Laurel House locate the survivor. Finally, the ability to see the household data and link profiles of parents to children is a very useful tool to help staff see the bigger picture.

MIGRATION ADVICE

The migration from Laurel House's previous case management software to the Bonterra Case Management solution brought numerous benefits to the agency. Laurel House can now see a client folder with all the data they need visible at once, making communication across programs, service provision, and continuum of care function effortlessly and smoothly. Because the Bonterra Case Management solution is easy to navigate, staff understand it better and can use it in a much more robust way than with their prior case management software.

For any organization considering a migration to Bonterra Case Management solution, Dougherty's advice is to be patient and prepared. "Have a good understanding of what you don't like about your current system, as well as what you need, like, and want in your new system. I think the more work you do on the front end makes it an easier transition on the back side." She also recommends making sure the entire organization is migrating, and not just one department making the change, and to make sure to get feedback from everybody. Lastly, she highly recommends using professional services during the process.

GOALS TO INCREASE FUNDING

Laurel House foresees the Bonterra Case Management solution helping them acquire additional funding to aid in their growth of programs and staff. As call volume, counseling hours, and shelter requests have risen, Laurel House requires additional staff to support these needs. The Case Management solution's customized reports show potential funders details of the growth and paint a clear picture of the organization's needs. Laurel House is confident that the ability to easily pull that data from Bonterra Case Management will help them obtain the necessary additional funding.



Summary

Laurel House's migration to their current and greatly improved case management solution allows them to more effectively run their agency across programs and sites, making life easier for staff and management. Having their new data management software also opens up possibilities of additional funding and staff to meet their growth needs. But most importantly, Laurel House's ability to leverage the Bonterra Case Management solution's features streamlines processes and adds efficiency and benefits such as increased staff retention and more time spent on what matters: time to assist survivors in need.

