

# County of San Diego Health and Human Services

## Improving county benefits processing through state-of-the-art content management



### Business overview

The County of San Diego Health and Human Services Agency (HHS) serves a population of more than three million with a broad range of health and social services, promoting wellness, self-sufficiency, and a better quality of life for all individuals and families in the county. San Diego is one of 18 California counties that depend on the CalWORKs Information Network (CalWIN) for qualifying and processing benefits to individuals. CalWIN is a transactional system that maintains case data, determines applicant eligibility, and automates delivery of information for public assistance programs such as Medi-Cal, CalWORKs, food stamps, general assistance, and foster care.

### Challenges

At the County of San Diego, HHS approximately 2,500 workers access CalWIN daily to enter client data and process applications. Each application must be accompanied by a range of supporting documents such as copies of the applicant's driver's license, social security card, and marriage license.

Previously, these supporting documents were stored in hard copy in each applicant's case file, and HHS workers had to search through paper case files to find the documents they needed to complete a case. Often, a case worker in one office had to call another office to locate a missing document, resulting in further delays—and if the case required further approval by a supervisor, the paper file had to be physically walked to that person for review and sign-off. These manual processes were slowing down the application process and straining HHS's ability to provide prompt service to its citizens.

"We needed to be able to work more efficiently without expanding our staff, which meant we needed to automate the entire end-to-end application process from document capture to benefit approval," said Ruth Ann Petro, Assistant Deputy Director of HHS. "The best solution would provide a seamless interface from CalWIN to the supporting documents, so our case workers would have everything they needed to process an application right at their fingertips."

HHS identified several requirements for the solution:

- The system should provide an electronic repository for documents that could be seamlessly accessed from CalWIN screens
- The system should be extremely easy to use, enabling case workers to access documents simply by clicking a link based on their access level
- Users should be able to search electronically for documents and data they need
- The system should enable applications to be routed electronically for review and final sign-off
- No changes should be made to the State of California's system of record—CalWIN

## EMC solution

To meet these objectives, HHSa partnered with technology consultant Burntsand, an EMC® Documentum® Select Services Partner, to implement an integrated solution based on the EMC Documentum content management platform. Documentum provides a centralized repository by which case workers, operating from remote offices throughout the County of San Diego HHSa system, can instantly access the supporting documents they need to process benefits.

Importantly, Burntsand designed the system as an application that interacts with CalWIN at the Windows messaging layer, rather than a modification of CalWIN itself. “CalWIN is very complex and controlled by federal requirements and regulations, and making changes would have required a lengthy and difficult approval process,” said Vinesh Goyal, the EMC Practice Director for Burntsand. “Documentum enabled us to create a separate application that could be easily integrated with CalWIN, without altering it.”

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**Ruth Ann Petro, Assistant Deputy Director**

## A seamless process

The system has been rolled out to more than 2,500 of HHSa’s users. With the new workflow, supporting documents provided by applicants are scanned and stored electronically in Documentum. The system organizes the documents according to “case files” that mimic the paper files that were once used by case workers, and documents are assigned attributes that link them to the CalWIN data about the applicant.

Now, instead of searching through paper files or tracking down hard copy documents that might not be readily available, HHSa users can instantly access the documents they need using hot keys within the CalWIN screen. Via the Documentum Webtop interface, each hot key activates an agent on the user’s desktop that launches a browser URL based on the active screen information. Users can then select the supporting document for verification purposes and quickly make a decision on the benefit request. Users can also access Documentum search capabilities to search for documents and forms based on keywords and attributes.

If the application needs to be escalated to a supervisor for further review, the user can automatically route the electronic case file to one or more reviewers. The system generates an e-mail notifying the reviewer that a file is awaiting approval.

“By enhancing CalWIN’s capabilities, the Documentum/Burntsand application has made a big difference in our ability to serve our clients promptly and efficiently, without having to increase staff,” said Ruth Ann Petro “Our users have embraced the system and are quickly becoming comfortable with virtual files and audit trails.”

## A budget-saving solution

For Burntsand, the most complex aspect of the development project involved mapping of more than 1,000 combinations of CalWIN screens and their associated documents and forms. Based on a detailed analysis of the HHSa operation that took into account security, filing procedures, and attributes, Burntsand worked with CalWIN subject matter experts to create system logic based on the screen number and its associated documents. “With the screen logic in place, this creates an application that other counties could benefit from as case loads increase and budgets decrease. The application can be easily re-configured for another county’s specific requirements, so we see this solution being adopted among other CalWIN participants in the near future,” said Vinesh Goyal.

## Summary

The Documentum extension to CalWIN as implemented by Burtsand has transformed the way the County of San Diego HHSAs work. Case workers are able to access the supporting documents they need to process an application for benefits, quickly and easily, and without having to search through paper files. The system breaks down geographical barriers across different HHSAs offices by providing a centralized location by which documents can be retrieved, routed, and approved. As a result, applications for benefits can be processed quicker and more thoroughly and the citizens of San Diego County can be served more effectively—all with existing staffing levels.



**EMC Corporation**  
Hopkinton  
Massachusetts  
01748-9103  
1-508-435-1000  
In North America 1-866-464-7381  
[www.EMC.com](http://www.EMC.com)