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Fairfax County - Health & Human Services Department (HHS)

PROJECT: ENTERPRISE CONTENT MANAGEMENT SYSTEM (ECMS)





Overview

The Fairfax County Health and Human Service ECMS (Enterprise Content Management System) is a digital document and case management system. ECMS enables Fairfax County HHS employees to capture, scan, store, manage, and share thousands of records daily related to social services and child care assistance programs. In addition, the ECMS provides Fairfax County with a strategic repository to enable the management of documents and records, improve data integrity, provide efficient search and reporting and enhance productivity. The system also facilitates a nightly bulk upload operation to the Virginia Case Management System's Document Repository in order to be compliant with state regulations for social services cases reporting. The OpenText suite of products provide the technical foundation for the ECMS including capture, scanning, case management, records management, and central repository for all documents and information related to casework.



BACKGROUND

The Fairfax County Health and Human Services Department (HHS) provides a multitude of social services for residents with disabilities, children, and older adults. These services include:



**Health
Care**



**Mental Health
Services**



**Disability
Services**



**Income
Assistance**



Housing



**At-risk citizens
Services**

This wide array of social services offerings results in thousands of applications and supporting documents being sent into the Fairfax County HHS Department and programs. Previously, the Department had been utilizing a variety of disparate software and processes to handle this massive intake of documents, but aging technology and changing business needs quickly led to the need for a digital transformation of the existing implementation. Additionally, due to the sensitive nature of some of these services, the state of Virginia also mandates a certain response and resolution time for each of these cases and applications. The ECMS project was undertaken with the goal of centralizing these various services and departments under one umbrella and providing a standardized solution for case and document management to enable caseworkers to more efficiently process their caseload.

The HHS Department is also responsible for reporting at the Virginia State level on certain documents it receives in order to remain compliant with state policies. One of the primary objectives for the ECMS project was to also automate this process, allowing for the automated detection and transfer of required documents to the state on a nightly basis.

Challenges

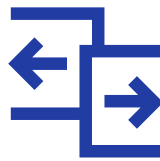
Fairfax County - Health & Human Services Department (HHS)



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Fairfax HHS was heavily reliant on paper-based ingestion of documentation from their various clients.

Although they had digital solutions in place for both case and document management, these solutions were not integrated and varied widely by department and program. Additionally, the same capabilities were not present across all systems and software. As a result, these systems suffered from unnecessary duplication of documents and client records with no easy way to manage or deduplicate. Discrepancies in process and the lack of standardization was also hindering the productivity of social caseworkers.



2

Multiple platforms lead to lack of consolidation

Beyond Document and Case management, the County was also utilizing a variety of additional tools to manage their employees and workloads. These included custom-built tooling as well as Excel spreadsheets. Another major aim of the ECMS project was to help consolidate this functionality into a single platform for all users and business leaders.



3

Manual Intake and Review of paper records

Fairfax County HHS employees intake and review thousands of paper records daily. These records are received in a variety of formats including, walk-in, email, fax and mail. These records had to be scanned, classified, and filed manually, often resulting in person-to-person transfer of paper documents, particularly when documents were routed to the wrong department or must otherwise be shared. The manual nature of the process led to duplication, as case files and resident details could be entered multiple times by different workers using different software packages. These issues led to delays in processing and duplication of work.

Solution

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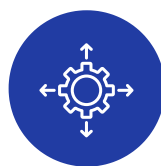
Counterpoint performed a thorough initial discovery and requirements gathering phase with Fairfax County HHS to fully understand existing processes, systems, and requirements. Particular focus was placed on the file plan and organizational requirements for digital documents as this was a point of concern for the client from previous implementations. Specifically, a hierarchy was created to allow all business departments to share documents effectively and to reduce the possibility of duplication of records.

The ECMS solution utilized a wide array of OpenText EIM Suite products to provide a modern document and case management system. OpenText AppWorks serves as the backbone of the solution providing for case management, workflow execution, and dynamic role and permissions security. For document management, OpenText Content Server was leveraged to provide a unified hierarchical file management plan for new clients and cases entering the system, avoids duplication of records, and provides robust search capabilities. Content Server also provides for a robust Records Management implementation allowing for variable triggers and dates for assessing individual records retention schedules. For handling the massive intake of documents, OpenText Capture Center was used to provide a single interface for scanning, as well as automated ingestion of documents from fax, network folders and other various sources. This single interface allows users to classify and file documents directly into OpenText Content Server. Finally, OpenText Brava enables the viewing and markup of documents that case workers utilize on a daily basis when communicating with one another or processing records from clients.

The ECMS Web Application built by Counterpoint Consulting functions as the single primary User Interface for all users. It provides access to case files, notes, and individuals in addition to a curated document browsing experience and search capabilities. Case workers are able to easily browse cases, message with one another, transfer documents and cases and upload new documents. Where previously a lot of these interactions were external to any software packages, the ECMS has allowed county employees to:



Work via a single application



Streamline document processing



Improving delivery of services to citizens

Enterprise Content Management System (ECMS)

Fairfax County - Health & Human Services Department (HHS)



100,000 - 200,000
Documents Scanned Monthly

Key Statistics



100-500
Cases per month



150,000
Active Cases



1-5 YR
Case Lifecycle



400
Users

KEY FEATURES



- Document Scanning and Classification
- Records Management
- Reporting (integrated with Microsoft Power BI)
- Integration with internal systems
- Integrations with external, 3rd party systems
- Automated notifications
- Automatic Tasking and workload management

TECHNOLOGIES USED



- OpenTextAppWorks
- OpenText Content Server
- OpenText Directory Services (OTDS)
- Integration with Azure Active Directory Management
- OpenText Brava
- OpenText Capture Center
- OpenText Office Editor
- FME Migration Center - Documentum to Content Server Migration Tool
- Counterpoint Consulting ALTO (HTML, Javascript, CSS, Marionette, Nodejs, Browserify)

EXTERNAL INTEGRATIONS



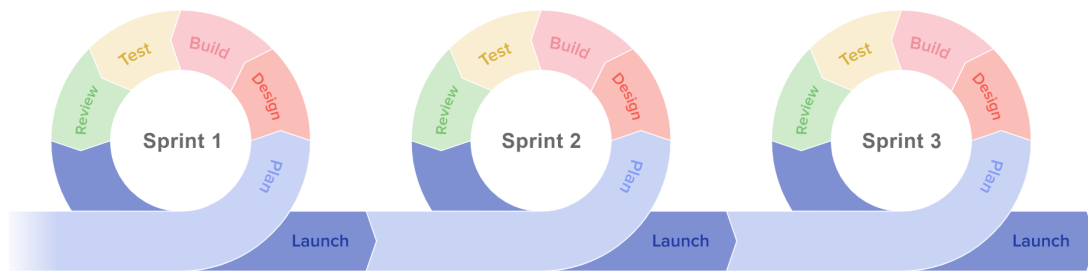
- RDBMS (SQL Server)
 - Application Database used by the entire application for storing and retrieving case and application data
- Virginia State Case Management System - Document Repository (FTP Read/Write)
 - Nightly bulk upload sent from ECMS system to FTP dropbox for ingestion by the state system
- Fairfax County Child Care Case Management System - API Push / Pull Integration
 - In-house local case management system which is set up to communicate with the ECMS application
- Microsoft Power BI Reporting - Report Embed



DEVELOPMENT METHODOLOGIES



- Agile
 - 2 Week Sprints
 - Sprint planning sessions and refinement
 - End of sprint end-user demonstrations



THIRD PARTY TOOLS



- Microsoft Team Foundation Server (TFS)
 - Code repository hosting
 - Code reviewing
 - Code branch merge management
- Microsoft Visual Studio Code
 - Primary Front-End development IDE
 - Critical extensions for code conventions and readability (prettier, eslint)
- Eclipse Foundation - Eclipse IDE
 - Primary Back-End (Java) Development IDE
- Visual SVN Server
 - Primary Subversion Hosting for AppWorks Collaborative Workspace documents

HARDWARE / PLATFORM / HOSTING



- Microsoft Windows Server 2016 Standard
- V4 CPU Cores
- 32 GB RAM
- On-premises VM Hosting - Fairfax County Government Data Center
- 1 VM allocated per OpenText Product
 - 5 VMs per environment