Social Solutions

Workflow

eto

The Value of Workflow

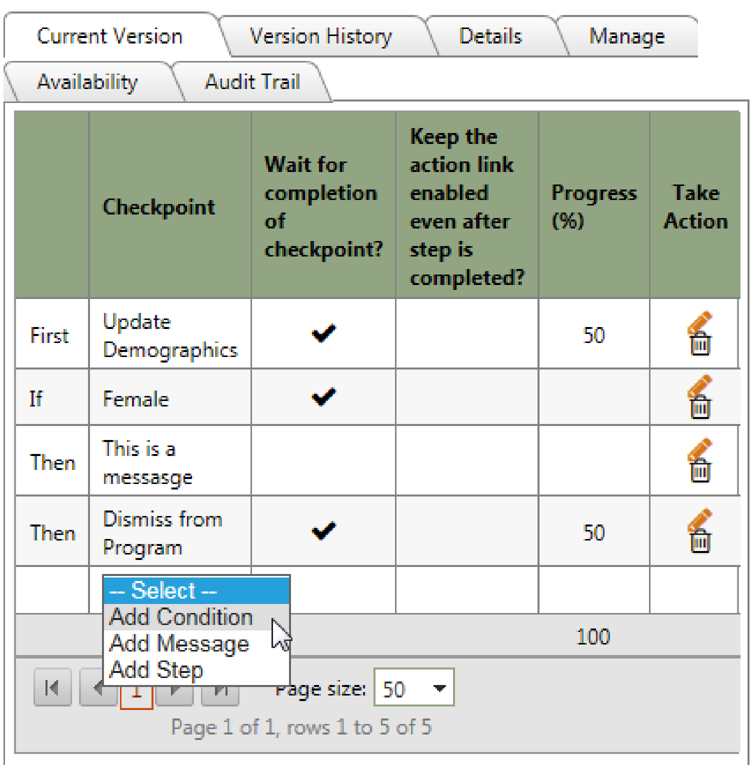
Save valuable resources and drive to outcomes

Workflow equips programs to:

- **Save critical hours spent on training resources –** With Workflow, staff are guided through critical tasks that must be completed for each client within ETO® software, allowing new staff to get to work right away with minimal training. Programs can quickly and easily implement new steps within a workflow without disrupting staff or spending hours training and retraining on system navigation.
- **Increase efficiency at the point of service –** Workflow eases navigation for frontend users by eliminating the need to navigate through several screens and remember what comes next in the program procedure. Not only does Workflow functionality save time for frontline staff, it allows their focus to remain where it belongs – on the client.
- **Maintain fidelity and drive intentionality –** You can be confident clients are receiving the full collection of prescribed services and that they are appropriate based on their needs and risk factors. By configuring workflows based on client criteria, such as demographics, assessment scores or answers, services can be tailored and targeted toward the clients that will benefit most.
- **Improve data quality –** By guiding staff through each checkpoint in ETO®, Workflow ensures crucial documentation is complete at every stage of service delivery.
- **Gain visibility –** Through a dashboard view of workflow progress, program managers can see which clients have received what services, understand where to focus staff coaching and development, and inform programmatic decision making to drive to outcomes.

Successful intervention relies on the right services being delivered at the right points in time, based on individual client needs. What's more, meeting funding and program compliance mandates depends on complete and accurate data collection and service documentation at critical points in a client's participation within your program. Delivering these interventions with fidelity to your program model, as well as documenting services and meeting regulatory and accreditation standards, presents a number of obstacles, including high volume of clients, complex program models and software navigation, restrained training resources, and limited visibility into staff activity and client progress.

Workflow directs and supports service delivery and documentation, minimizing staff training needs, improving fidelity of program implementation, and ensuring completeness and accuracy of documentation. By using Workflow, you can be confident clients are receiving the services they need to achieve outcomes and your program has the data and documentation necessary to meet compliance needs and demonstrate success.



	Checkpoint	Wait for completion of checkpoint?	Keep the action link enabled even after step is completed?	Progress (%)	Take Action
First	Update Demographics	✔		50	
If	Female	✔			
Then	This is a messasge				
Then	Dismiss from Program	✔		50	
	-- Select --				
				100	

Workflows are customizable, allowing the Administrator to define checkpoints as conditions, messages or steps, whether a step must be completed before the user is able to move on to the next checkpoint, and the percentage value of each step in the workflow.

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Workflow in Action – Streamlined Intake

An example of practical usage

A multi-service organization implements Workflow to streamline their intake process, which involves several steps, documentation requirements, and funnels clients toward appropriate programs within the organization:

1. At the time of program enrollment, a workflow is triggered, directing the staff to complete a Risk Assessment.
2. If the risk score is lower than 5, the staff is directed to complete an internal referral for regular intensity services.
3. If the risk score is greater than 5, the staff is directed to complete the Intensive Risk Assessment and Safety Plan, review their safety plan with a manager, and complete an internal referral for high intensity services.
4. Dependent on the client criteria, the client is automatically enrolled in a subsequent workflow to drive continued service delivery.

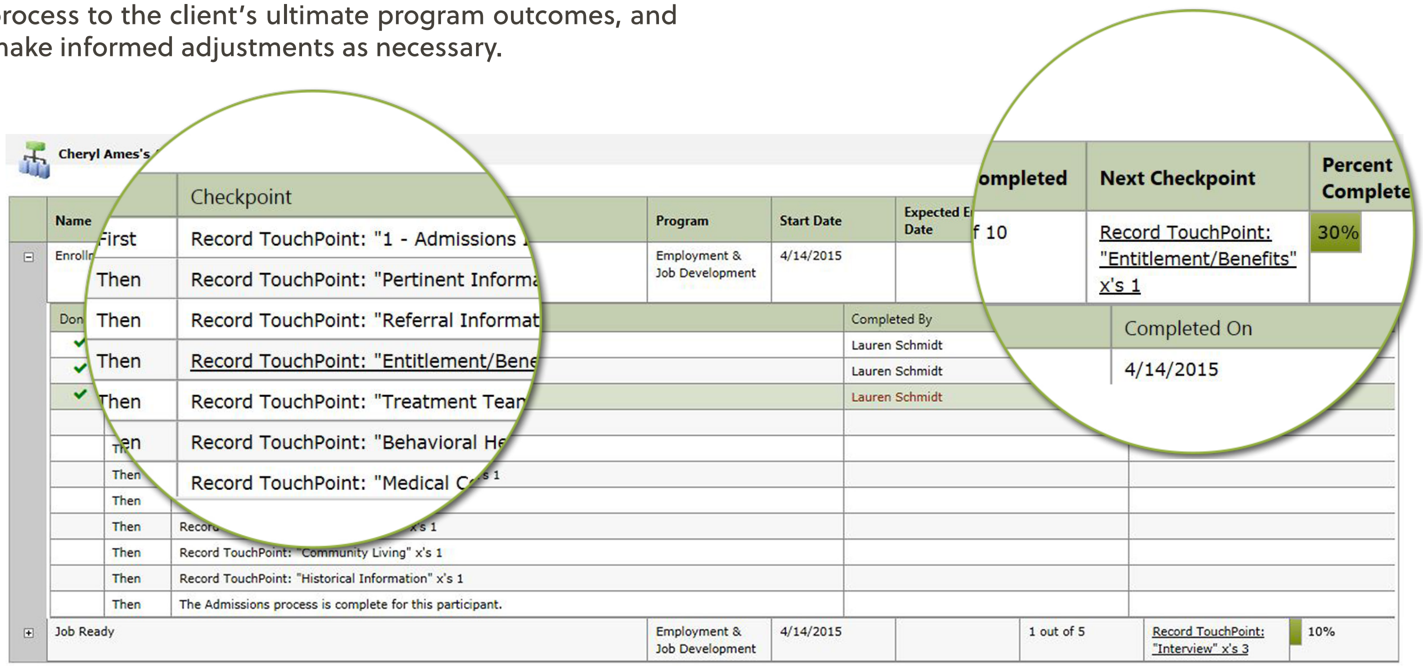
Staff and managers can view each client's progress through the intake workflow and work together to address any gaps or issues that arise. Once the client continues on to receive other services, the program manager uses ETO® software's reporting tools to relate the organization's efforts expended during the intake process to the client's ultimate program outcomes, and make informed adjustments as necessary.

How Does Workflow Work?

Efforts to Outcomes (ETO®) software's Workflow functionality organizes program processes and drives best practice by designating critical tasks as checkpoints, and linking them into a streamlined procedure. With Workflow, staff are guided through the checkpoints in the prescribed order, which may vary by client needs or other criteria, and can easily see how much work has been completed and how much remains for the client to complete the workflow. Managers can manage to outcomes by ensuring that all clients are receiving the required services and that documentation is complete and timely.

An administrator creates a workflow that staff can use to manage the clients in their caseload. A workflow can be triggered in various ways, including when a client is enrolled in a program, or when certain criteria are fulfilled. Staff follow the workflow step-by-step to ensure that each client receives all required services. As the client progresses through the workflow, the system automatically checks off each step as it is completed.

Staff and managers can review a client's active workflows and workflow history at any time, ensuring that the client is making progress through the program. Workflow eliminates any speculation about where each client is in the program: users can see exactly what a client has completed and which milestones are still left to complete, ensuring the client is receiving program services in full.



Workflow allows staff and program managers to review a client's active workflows and workflow history at any time, ensuring that the client is making progress through the program. The workflow review provides access to key information, including the number of steps completed, the percentage complete, and which steps have been completed, by whom, and when, and which criteria have been met.

To learn more about how ETO® Workflow can help your organization and improve client outcomes contact us today, or visit us online at https://socialsolutions.com