

Xora Case Study

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Mental Health Agency

Situation

A mental health agency in the southern U.S. provides counseling, education and assistance to persons who are struggling with mental illness or substance abuse.

Many of the agency's clients live independently. These clients are assigned case workers who visit with the clients in their homes several times per month, helping the clients to retain their independence. The agency employs roughly 70 case workers who canvas the city each day.

Challenges

The agency had several challenges to address in its daily operations. First, because employees are out in the community all day long, the agency did not always know where case workers were during the day. This made schedule changes difficult, as communication between management and case workers was asynchronous. Secondly, employees used paper maps to find their clients. This was cumbersome for the case workers who were often traveling to unfamiliar or remote areas. Thirdly, the agency had no way to validate mileage reported by case workers. Case workers kept and submitted paper records, but the agency had no good way to verify the accuracy of the records.

Solution

Implementing Xora workforce management software helped the agency to address many of its daily challenges. They had tried other, similar products, but the other products were not flexible enough to accommodate the agency's existing business processes. Xora was able to be configured to meet their needs, and robust enough to rise to their challenges.

Results

Since deploying Xora, the agency has made several improvements to the communications between case workers and office staff. They have created forms that allow case workers to enter visit information into their BlackBerry devices and then have a summary of the information sent to the case worker via an automated report at the end of each day. This helps case workers to keep track of the client interactions at each visit and makes reporting on each case more accurate.

The agency has more visibility of their case workers, and now knows immediately if someone is running behind schedule or requires an auxiliary staff member for support. Turn-by-turn directions mean case workers no longer have to juggle paper maps while looking for their next appointment. When case workers submit mileage records, the agency can cross-reference the mileage data collected by Xora with the mileage reported by employees to verify reporting accuracy.

Xora has helped the agency enhance communication between case workers and office staff, increase the safety for case workers, and improve the accuracy of reimbursement records. Says the agency's Controller and Associate Director, "Xora has been able to adapt to the way that we do business. So far, it has been able to help us with any hurdle we've thrown at it."

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