# Over 4,500 Ontario social workers rely on Coyote FORMWORKS to help them protect the children in their care

*The case management software system that you'll find on approximately 4,500 desktops at 28 different Children's Aid agencies across the province of Ontario is a custom version of Coyote Software's FORMWORKS program. Since it was first adopted in 2007, FORMWORKS has added extensive new recording and reporting capabilities to the agencies' existing database systems. According to Rocco Gizzarelli, "It's a much more integrated system. It works wonderfully for us."*

## The challenge

As agencies mandated by the Ontario Government "to protect children from harm", Ontario's Children's Aid Societies (CASs) are legislated to investigate allegations of abuse and neglect, to protect children, to provide counselling and other services to families for protecting children, and to place children for adoption.

With such a broad scope of responsibilities, CASs have information management needs that are both complex and unique. Not only are privacy and confidentiality issues paramount, but maintaining workflow efficiency is a constant challenge because of the high level of detail that child care workers are required to document and track on each of their cases. Adding to the complexity is the fact that not all CASs in Ontario use the same information system to do their documenting and reporting. Plus, whenever the Ministry of Children and Youth Services changes the agencies' reporting requirements to keep pace with new initiatives and evolving child care legislation, the CASs must find ways to expand their existing databases to meet those new requirements.

According to Rocco Gizzarelli, Director of Services, Catholic Children's Aid Society of Hamilton, many CAS agencies were impeded in their recording capabilities by the legacy systems that they had started using in the nineties but had since outgrown. "The information system that Children's Aid Societies were using was in definite need of bug repair, and we also needed to enhance its capabilities to make it work better for our end users," he explained. "The initial system was only for protection-related work, but since it was introduced, the Ministry's reporting requirements increased, so we needed a way to expand our recording capabilities to include our Children's Resource workers, our adoption services, our Children in Care work, and our legal database."

## The solution

So how exactly do you teach an 'old' database new tricks? For the answer to that question, the CWIS ("Child Welfare Information System") Executive Committee members turned to the Coyote Software Corporation, who recommended a new web-based program that they called FORMWORKS.

Rather than replacing an agency's existing database, FORMWORKS connects to it in ways that expand its capabilities, especially in the areas of form handling and document management. FORMWORKS gives organizations the capacity to convert paper-based and text-based forms into intelligent, 'data-aware' forms that integrate directly with an agency's information database. It also acts as a central repository for all of an agency's important documents, past and present.

For the group of 28 CASs that Mr. Gizzarelli's Software Steering Committee supports, the fact that FORMWORKS could actually add new forms and fields to their existing databases meant that they would be able to accommodate all of the Ministry's new reporting demands without having to replace or redesign their entire information system from scratch. And its document management features offered them a further opportunity to convert all of their legacy system's data into the new FORMWORKS format, for added ease of use and continuity.

According to Mr. Gizzarelli, Coyote's FORMWORKS recommendation made sense to his Committee from the start. "A few years ago, Coyote started talking to us about their web-based services. So we had a huge user group meeting, we set the direction, and the agencies contracted directly with Coyote to help us move over to FORMWORKS. We all put money in as agencies, and the Ministry also put in money, because they had specific statistics and information that they wanted to make sure we were capturing. And we've been working with Coyote ever since."

## The development process

To tailor their FORMWORKS program to meet the needs of the CASs, Coyote worked closely with their Committee. "When we got our new standards, Coyote's lead business analysts met regularly with our Software Steering Committee," said Mr. Gizzarelli. "We designed the forms with them, specific to our needs.

"Coyote worked closely with us. They held focus groups with our people across the province, they added all the new forms to the system with us, they did the testing with us, and they helped train us and developed our manuals for us. It was laborious and very detailed work.

"Coyote didn't do any guesswork," he continued. "They met with all our key stakeholders. They worked really closely with the field. That's how you have to do it. As a result, we rolled out the FORMWORKS system to 28 agencies and over 4500 social workers with very few complaints – and believe me, our people are not afraid to call and complain!"

Mr. Gizzarelli said that it was quite a contrast to their previous experiences with new software systems. "To give you just one example, when we had developed our first information system back in 1997, the process of migrating old files was an absolute nightmare for agencies, both because of the volume of data and because of the approach they took to migrate the data. I can't tell you how big of a mess it was. But this time, when we converted our data to FORMWORKS, Coyote simply did it in PDF format. It was a seamless process when Coyote did it – much better than the first time around. Because Coyote understands our business."

## The result

With FORMWORKS, CAS agencies now have a common tool that captures and automates all of the most important workflows and forms that shape their busy days. The program's unique workflow engine allows caseload managers at any CAS agency to step through the form completion process for each aspect of their caregiving in ways that not only automate but also streamline the form completion process. Built-in supervisor approvals ensure that both information and approvals are obtained whenever required, and all tasks and notifications that fall out from the successful completion of each form are also automatically set into motion. As a result, caregivers are able to perform their daily tasks more efficiently, securely and reliably.

In Mr. Gizzarelli's view, Coyote's ability to understand their child protection "business" is key to the success of their new FORMWORKS system. "You know Mark Timmerman, the Coyote guy that they have working with us at the Software Steering Committee? I could hire him as a Protection Worker tomorrow. He understands our business that well. He's just an incredible resource. He really understands what we do. And so does Kirk *[Were, Coyote's Managing Director]*. They've taken the time to understand us."

As a result of their ongoing collaboration, Mr. Gizzarelli says that the agencies have developed a close working relationship with Coyote. "They've done cartwheels for us. And they've done things that they probably could have charged us double for, and they haven't. Their hearts are in the right place. They're doing it for the kids. They know what kind of business we're in, and they know how crazy our system is. They live it with us. We have a good relationship with them."

## The benefits

And the system itself?  According to Mr. Gizzarelli, "FORMWORKS is a broader base recording system that gives us more than we've ever had before.  It's a much more integrated and comprehensive system for us.  It works wonderfully.

"What's important is that we now have a system that works for us.  It's meeting our needs.  One of our priorities now is getting reports out of the system, and Coyote has made that a focus.  We're always looking for improvements in the field, and Coyote helps us with that.  They've been really fantastic in helping us evolve over the years."

Among FORMWORKS' many advantages, said Mr. Gizzarelli, are its web-based delivery mode and its security features.  "The fact that it's web-based is very important to us, because now, I can get into the system remotely from wherever I am.  That's very important.  It's also very secure – they've done a very good job with security.  The regulations regarding confidentiality with our clients are mandated by the Ministry, and then we have our own rules as well.  Coyote understands all of that."

Also key is the system's ability to accommodate and support different workflows within their agencies.  "Our businesses are really complex, and the different requirements on each type of worker are reflected in our FORMWORKS system.  So for example, our Children in Care workers have a whole set of regulations and standards and workflow that they have to go through.  Child Protection as well, and Adoption ... they all have their own unique requirements.   We report everything, and our front-line staff across the province have a hard time keeping up with the workload.  FORMWORKS helps each type of worker to stay on top of it all."

Apart from the benefits of the system itself, what Mr. Gizzarelli keeps going back to is the strength of the working relationship between the agencies, the Software Steering Committee and the Coyote Software company, which he feels bodes well for future improvements to their system.  "I know you're probably thinking to yourself, don't I have anything bad to say about this?  Sure, there are annoyances – any process will have its bumps along the way, and don't get me wrong, we've had our bumps.  But we have such a good working relationship with Coyote, we can always sit down and talk about what's in the way, and what's next.  We're frank with each other.  I think there's a great sense of trust and safety amongst us.  We have a great working group.

"I have the utmost respect for Coyote.  They certainly have walked the mile with us.  Kudos to them."

**About FORMWORKS:**
FORMWORKS is Coyote Software's premier solution for any agency that wants a better way to **handle their forms** and **manage their documents**.  FORMWORKS converts your paper-based and text-based forms into intelligent, "data-aware" forms that integrate directly with your agency's information database.  In so doing, FORMWORKS transforms everything about the way you handle forms in your workplace.  It improves not only the way that you fill out forms, but also the way that you process them, share them, protect them, find them, analyze them and store them.

**About Coyote Software:**
Coyote Software Corporation specializes in providing software solutions to service-oriented workplaces. We offer a full range of software development, business consulting and systems integration services tailored to the unique needs of the following industries: health and social services, the green industry, and a broad range of service-industry sectors including retail, transportation logistics, waste management, and museums.

**For more information:**
About the Catholic Children's Aid Society of Hamilton:  http://www.hamiltonccas.on.ca/
About the Coyote Software Corporation: http://www.coyotecorp.com/