

CLIENT Patient Ombudsman (Ontario)
PROJECT TITLE Case Management System

Effective
Casework
to make
Every
Experience
Matter

Every health sector complaint professionally captured for resolution and potential investigation.

The new organisation sought an end-to-end case management system to support this approach and their new processes.



A New Champion for Fairness in Ontario's Health Sector

Ontario's Patient Ombudsman came into effect in July 2016. Christine Elliot, the Canadian province's first Patient Ombudsman, wishes to ensure "that everyone who reaches out to my new office feels heard and understood."

The Patient Ombudsman serves the people of Ontario who have complaints about health sector organisations namely, public hospitals, long-term care homes and community care access corporations (CCACs).

The Ontario Government passed a Bill establishing the Patient Ombudsman in December 2014*. Health Quality Ontario (the advisory body on quality in health care for the province) was then tasked with the establishment of the Ombudsman's office. A key part of the project was the selection of a case management system.

The new organisation sought an off-the-shelf, end-to-end solution that could support their processes with minimal configuration. A robust procurement exercise led to the selection of Workpro case management software from Edinburgh-based Computer Application Services Ltd (CAS).

Workpro will be used to document and track complaints, standardise and streamline workflows and provide management reporting and information.

A proven solution used by many organisations in the United Kingdom and worldwide, Workpro has been specifically developed to meet Ombudsman and Commissioner needs. Ongoing development ensures the software keeps abreast of market, technology and legislative changes, with regular user input informing the product roadmap. The Patient Ombudsman will be able to capitalise on CAS's experience of the Ombudsman community which is reflected in the product.

Out-of-the-Box Solution with Minimal Configuration

Workpro case management software efficiently manages complaints, requests and investigations in one integrated system. Built-in intelligent workflow, templates and targets ensure quality and consistency in case handling.

The Patient Ombudsman's solution is based on a Workpro version which comes pre-configured with a best practice complaints model out-of-the-box, as defined by the SPSO Complaints Standards Authority (CSA)**. The CSA aims to standardise and simplify public sector complaints handling and to promote learning and improvement.

Workpro supports case handling within the Patient Ombudsman by:

- Accepting new cases however they come in, e.g. by web form, letter, e-mail or telephone.
- Validating case entry for accuracy and completeness, saving time & reducing errors.
- Integrating all case document management, plus e-mail and document templates for consistency and speed.
- Prompting case progress with alerts and reminders.
- Dashboards allow managers to quickly review case progression to identify any bottlenecks or resource issues.

The Patient Ombudsman had some additional requirements, for example an extra case type. CAS Business Analysts worked closely with the client project team to complete the minor customisation required to configure the system to their process, reporting and documentation needs, as well as their specific targets, KPIs (Key Performance Indicators) and terminology.

The system was delivered to agreed timescales and within budget.



**Patient
Ombudsman**



"Workpro was selected following an open, competitive bidding process. In addition to meeting our technical requirements,

we were impressed by the user feedback provided by current clients of CAS. Workpro emerged as the solution that we believe will best serve our needs. We have enjoyed a great working relationship with CAS and very much appreciate the support and expertise of the CAS team." **Lenna Bradburn, Executive Director (Interim) for Patient Ombudsman**

Learning and Improvement

Workpro's key strength is the level of management information provided by the system, vital for learning and improvement initiatives. Workpro will support the Patient Ombudsman in her laudable aim to ensure that Every Experience Matters by:

- Capturing and recording every case and its outcome for reporting purposes.
- Collecting categorisation data as part of the workflow, for root cause and trend analysis.

Web Form Integration

An online submission form, based on standard Workpro web services, was developed for the Patient Ombudsman. This allows complainants to easily record a complaint using a web form. This then automatically creates a case in the Workpro complaints management system. The complainant is immediately provided with a case reference number and Patient Ombudsman staff are able to start complaint resolution with relevant details already captured.

Complainants select items from lookup lists, such as the health service organisation they have an issue with. This removes the need for staff to type in details from a paper form, saving time. The complainant is also guided to provide the right information, for example the chance of the complainant getting the health provider's name wrong is reduced.

Telephony and Scanner Integration

The Workpro system has also been integrated with the Patient Ombudsman's telephony and scanner solution (not provided by CAS).

When someone phones up the Ombudsman they are asked if it is an existing case. If it is the call handler can enter the case ID and the telephony software then routes the call. If it is a valid case ID, a case summary will pop up in a browser window so that the case is opened for the call handler.

The scanner Integration enables scanning of printed Complaint Forms and other documents related to a case file. When the case ID is entered in to the scanning solution, the scan goes straight to the case document section for that case within Workpro.

*Workpro is built on the Microsoft technology stack, but is developed and owned by CAS, using our extensive experience and knowledge of complaints and case management systems.

** www.valuingcomplaints.org.uk. The CSA was established by the Scottish Public Services Ombudsman (SPSO).

Other Workpro Ombudsman clients include

Local Government
OMBUDSMAN

SPSO

Housing
Ombudsman Service

