

Quality and Productivity Commission
29th Annual Productivity and Quality Awards Program
Champions of Change: Together We Make a Difference

2015 APPLICATION

Title of Project (Limited to 50 characters, including spaces, using Arial 12 point font):

NAME OF PROJECT: CAMS – IMPROVING CLIENT CASE MANAGEMENT

DATE OF IMPLEMENTATION/ADOPTION: OCTOBER 16, 2011
 (Must have been implemented at least one year - on or before July 1, 2014)

PROJECT STATUS: _____ Ongoing One-time only

HAS YOUR DEPARTMENT PREVIOUSLY SUBMITTED THIS PROJECT? _____ Yes No


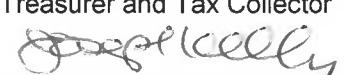
EXECUTIVE SUMMARY: Describe the project in 15 lines or less using Arial 12 point font. State clearly and concisely what difference the project has made.

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The Treasurer and Tax Collector/Public Administrator (PA) and the Department of Mental Health/Public Guardian (PG) provide critical services to a special population of County constituents that are unable to care for themselves. The PA serves as estate administrator for deceased citizens' estates where no family or authorized individual is available and/or willing to do so. The PG provides care for elderly, disabled conservatees, and mentally disordered criminal offenders. The County departments involved in their care must accurately track over 40,000 cases and over \$140 million in financial transactions. For the past 30 years, the PA and PG used an aging mainframe system to manage these cases. The system had become outdated and increasingly constrained the PA's and PG's mission to provide effective service to their clients. Based on input from County Counsel, the Medical Examiner-Coroner, and the DHS/Morgue, staff from the PA and PG collaborated on the development of the Client and Asset Management System (CAMS). CAMS is a fully integrated solution that has revolutionized and transformed the way the County does business by ensuring accurate, efficient and accountable operations for the PA and PG's at-risk clients.

(1) ACTUAL/ESTIMATED ANNUAL COST AVOIDANCE	(2) ACTUAL/ESTIMATED ANNUAL COST SAVINGS	(3) ACTUAL/ESTIMATED ANNUAL REVENUE	(1) + (2) + (3) = TOTAL ANNUAL ACTUAL/ESTIMATED BENEFIT	SERVICE ENHANCEMENT PROJECT
\$	\$	\$	\$	<input checked="" type="checkbox"/>

ANNUAL = 12 MONTHS ONLY

SUBMITTING DEPARTMENT NAME AND COMPLETE ADDRESS Treasurer and Tax Collector 500 W. Temple Street, Suite 437 Los Angeles, CA 90012		TELEPHONE NUMBER (213) 974-0704
PROGRAM MANAGER'S NAME Ron Moskowitz		TELEPHONE NUMBER 213-974-7618 EMAIL rmoskowitz@ttc.lacounty.gov
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE <small>(PLEASE CALL (213) 893-0322 IF YOU DO NOT KNOW YOUR PRODUCTIVITY MANAGER'S NAME)</small> Tom Ivey 		DATE 7-1-2015 TELEPHONE NUMBER 213-974-7677 EMAIL tivey@ttc.lacounty.gov
DEPARTMENT HEAD'S NAME AND SIGNATURE Joseph Kelly, Treasurer and Tax Collector 		DATE 7/8/2015 TELEPHONE NUMBER (213) 974-2101

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1st FACT SHEET – LIMITED TO 3 PAGES ONLY: Describe the **Challenge, Solution, and Benefits** of the project. State clearly and concisely what difference the project has made. Use Arial 12 point font

The Challenge

Serving At-Risk Populations

The Treasurer and Tax Collector/Public Administrator (PA) serves deceased citizens' estates where no family or authorized individual is available and/or willing to do so. The Department of Mental Health/Public Guardian (PG) serves Probate Conservatorship clients and Lanterman-Petris-Short Program (LPS) conservatees. Probate conservatees are usually elderly or disabled and unable to care for themselves. LPS conservatees are mentally disordered, often criminal offenders, who lack the capacity to effectively incorporate themselves into society in appropriate ways. All of these aforementioned groups require special attention and care, and the law imposes fiduciary levels of responsibility (i.e., a high degree of trust and confidence) on the PA and PG in administering their estates (assets and finances) and their persons, whether for placement and care in a nursing facility, or for a dignified funeral.

Estate Management Concerns

Identifying and protecting property for the best interests of the conservatees and estates is a critical function that requires a fiduciary standard of care, which is monitored by the Courts. Mistakes can adversely impact these clients and lead to financial penalties for the PG or PA, creating risks at several levels.

Failing System

The original case management system, the Los Angeles Public Administrator Information System (LAPIS), was developed in 1981. LAPIS used an obsolete programming language and had become increasingly difficult to maintain and enhance. The limited features and batch-oriented processes had an escalating negative impact on operations and the provision of services. The PA and PG needed a system with web-based features that would reduce risk, ensure accurate audit control for the estate, improve asset management, increase employee productivity, and provide support for improved care and follow-up visits for conservatees. LAPIS did not provide a means for inter-departmental communication or collaboration. County Counsel, the Medical Examiner-Coroner and DHS/Morgue relied on manual and paper-based methods to support case management at the PA and PG.

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The Solution

The vision that gave rise to CAMS was of an integrated system that would transform the delivery of services to the clients and estates served by the PA and PG. An innovative design would produce a system defined by its ability to provide efficient, flexible, and reliable solutions.

Development of CAMS began with an intensive period of consultation with dozens of subject matter experts from the five impacted Departments. The TTC project managers and the vendor (Capita Technologies) used the resulting set of robust business requirements to create CAMS, a web-based application system.

The three major components of the system are Case Management, Asset Management, and Financial Management. Annually, CAMS manages over 40,000 cases and over \$140 million in financial transactions for the PA decedent estates and PG conservatees. CAMS serves over 400 users, including staff from the PA, PG, County Counsel, the Medical Examiner-Coroner and DHS/Morgue. CAMS provides an enterprise-wide approach to enhancing the services of the departments that perform and facilitate PA and PG responsibilities such as data gathering, research, decision making, performance metrics, application security, and integration with other systems.

The Benefits

Improved Care

- Improved case administration and conservatee management: reduced manual and redundant processes free staff to focus attention on core service activities including court appointments, field calls, and periodic client visits.
- Web-based Access to Direct Deposit: electronic distribution of benefits enabling the DMH Representative Payee service program the flexibility to provide payments to homeless individuals regardless of their location.

Reduced Risk

- Lost & Unassigned Cases: case file tracking module reduces risk of lost or misplaced files.
- Comprehensive Audit Trail: provides essential controls and protections, tracks transactions and properly accounts for them. A fully documented audit trail ensures that the decedents or conservatees' assets are properly managed, bills are paid, and funds are not misappropriated.

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Enhanced Productivity

- **Workflow Automation:** moves and tracks the investigation, appointment and administration of PG and PA cases throughout their lifecycles. Timely assignment, review, and approval of tasks keeps cases on track.
- **Alerts & Notifications:** when a specific action or status occurs, the system prompts the user to perform the required tasks, which prevents delays.
- **Conversion of physical files to electronic media:** ability to attach electronic documents to case workflow provides access to information when needed; eliminating time spent searching through physical folders/files. Sharing of electronic documents eliminates the inefficient transfer or copying of physical documents.

Improved Administration

- **Integrated Accounting:** eliminated redundant entry into an external accounting system, replaced spreadsheets maintained manually outside of the system, and provided automated report generation for Court Accounting.
- **Business Continuation Plan support of check printing:** ensures that conservatees and providers receive payments in the event of failure or unavailability of production system.
- **Tracking of vendors:** timely management of care facilities and other providers to ensure continuous and appropriate provision of required care.
- **Accurate, up-to-date Forms and Correspondence:** electronic templates and automation of forms and letterhead allows the 200+ forms and letters used by PA and PG to be updated and changed, eliminating the manual and labor-intensive identification of needed corrections, and the coding needed to incorporate them into application-generated letters and correspondence.

Departmental Collaboration

- **Integration of referrals from DHS/Morgue and Coroner-Medical Examiner:** seamless import to PA case management system results in accurate and timely investigations and reporting.
- **Integration of case information with County Counsel:** automated data sharing through file transfers from RMIS, the County Counsel case management system; legal guidance and direction communicated efficiently and based on up-to-date case files.

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LINKAGE TO THE COUNTY STRATEGIC PLAN (DETAIL IS REQUIRED FOR COUNTY DEPARTMENTS): Use Arial 12 point font

CAMS supports Strategic Plan Goal #1: Operational Effectiveness/Fiscal Sustainability through innovative system features that transformed the way the Public Administrator and the Public Guardian manage their internal processes. CAMS automation of workflows and cross Departmental functionality also produced a stronger and collaborative coordination of efforts with County Counsel and the Coroner. Streamlined operations resulted in more efficient and timely delivery of services to both estates and clients.

Closely linked to its impact on operational effectiveness, CAMS also provides support to Strategic Plan Goal #2: Community Support and Responsiveness. System enhancements have freed the PA and PG from process inefficiencies so they can provide a higher level of attention and care to at-risk populations. The outcome is an enrichment of lives through improved County services.

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COST AVOIDANCE, COST SAVINGS, AND REVENUE GENERATED (ESTIMATED BENEFIT): If you are claiming cost benefits, include a calculation on this page. You must include an explanation of the County cost savings, cost avoidance or new revenue that matches the numbers in the box. Remember to keep your supporting documentation. Use Arial 12 point font

Cost Avoidance: Costs that are eliminated or not incurred as a result of program outcomes.

Cost Savings: A reduction or lessening of expenditures as a result of program outcomes.

Revenue: Increases in existing revenue streams or new revenue sources to the County as a result of program outcomes.

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\$	\$	\$	\$	X

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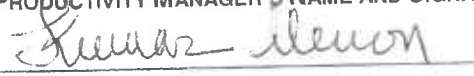

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FOR COLLABORATING DEPARTMENTS ONLY

(For single department submissions, do not include this page)

DEPARTMENT NO. 2 NAME AND COMPLETE ADDRESS DEPARTMENT OF MENTAL HEALTH 550 S. VERMONT AVENUE LOS ANGELES, CA 90020	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE  KUMAR MENON, MSPA	DEPARTMENT HEAD'S NAME AND SIGNATURE  MARVIN J. SOUTHARD, DSW
DEPARTMENT NO. 3 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE
DEPARTMENT NO. 4 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE
DEPARTMENT NO. 5 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE
DEPARTMENT NO. 6 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE

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DEPARTMENT NO. 2 NAME AND COMPLETE ADDRESS DEPARTMENT OF MEDICAL EXAMINER- CORONER, 1104 N. MISSION ROAD, LOS ANGELES, CA 90033	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE INNA SARAC 	DEPARTMENT HEAD'S NAME AND SIGNATURE MARK A. FAJARDO, M.D. 
DEPARTMENT NO. 3 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE
DEPARTMENT NO. 4 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE
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DEPARTMENT NO. 2 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE <i>Mary C. Wickham</i> <i>Intergen County Counsel</i>
DEPARTMENT NO. 3 NAME AND COMPLETE ADDRESS	
PRODUCTIVITY MANAGER'S NAME AND SIGNATURE	DEPARTMENT HEAD'S NAME AND SIGNATURE
DEPARTMENT NO. 4 NAME AND COMPLETE ADDRESS	
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