Simplifying your CMS transition with Sara client communication software

Executive summary

In today's rapidly evolving human services landscape, organizations face the challenge of upgrading their case management software (CMS) to meet modern client communication and compliance standards. This process is long and often overwhelming for case managers who are already shouldering large caseloads. Instead of working in suboptimal status quo conditions in the years leading up to a CMS upgrade, organizations are adopting Sara — a digital assistant from SaraWorks that can be implemented in just 30 days — to create efficiencies, streamline processes, and ensure a smooth transition to a new CMS.

The inevitability of change within organizations demands efficient solutions, and organizations can adopt a proactive stance for the best return-on-investment. Sara digital assistant supports agencies throughout the process, from gathering CMS requirements to lightening the administrative work around caseloads to helping organizations deliver better outcomes.

Key challenges *and solutions*

Challenge 1: CMS upgrade timeline and demands

Establishing requirements for CMS vendors can be a daunting task, and organizations can wait up to 30 months from the start of the procurement process to implementation. Meanwhile, client needs persist.

Solution:

Sara alleviates the burden on staff before, during, and after a CMS upgrade by automating and reducing duplicative tasks. Adopting Sara early in the process leads to a tangible return-on-investment. The implementation of Sara typically takes only 30 days.

Challenge 2: Efficiency and productivity

Efficiency and productivity are problems that plague case managers in the day-to-day and have a direct linkage to successful client outcomes. Organizations don't have to wait for a new CMS to turn these outcomes around.

Solution:

Sara helps organizations set the right CMS requirements, establish best practices, and enhance client outcomes. It facilitates faster case note generation, appointment and bulk notifications, and centralizing client communications, contributing to a better overall client experience of the organization.

Challenge 3: Ensuring a successful transition

Preparing for a new CMS requires months of staff training, potential workflow adjustments, and managing staff needs as they adapt. These can all impact the success of the transition.

Solution:

Sara integrates seamlessly with any CMS, and promotes best practices for case managers ahead of the switchover.

Managing a long and critical meantime

Change happens slowly inside of government divisions and fast outside, among the populations they serve. This can make a change as large as a department or state-wide upgrade to cloud-based case management software (CMS) feel like running on a treadmill with no “Off” or “Slow” button, ending at the base of a mountain.

The treadmill:

Case managers, often in understaffed departments, serve a growing number of clients who are more likely to answer a text or social media message than pick up the phone. Those same case managers are routinely asked to copy and paste communication into a case management software system (CMS) so that their work is fully documented as case notes— in reality, duplicating their already outsized workload. Despite the demands of the day-to-day, compliance and client needs never let up.

The mountain:

(looming in the distance, for now): A cloud-based or otherwise upgraded CMS can take anywhere from 24-30 months from the time of request-for-proposal (RFP) to implementation. With the Sara client communication software from SaraWorks, local governments have a tool that will ease their staff’s burdens rather than add to them during and after this transition. And the sooner they adopt Sara, the sooner they’ll have a quantifiable return-on-investment (ROI) to report from the transformation overall.

Boosting efficiency and smoothing delivery before, during, and post-CMS upgrade

Organizations can deliver on their missions while preparing for and orchestrating successful CMS upgrades through:

1. *Determining CMS requirements based on practice, not theory*
2. *Establishing best practice workflows that result in happier, more productive teams*
3. *Enabling more successful client outcomes*

All of the above are made possible with the implementation of Sara ahead of a CMS upgrade.

Sara's role on a typical CMS integration timeline

From anticipation and uncertainty to progress, pre-implementation:

Month 0
Needs identification
Sara helps teams identify what features they already have and what they still need from a CMS.

Month 1
RFP
The process of developing an RFP is easier and the request is well defined, ensuring success later.

Month 6
Award
Selecting a vendor is a more straightforward and cost-optimized task given the groundwork already done.

Month 24-30
Implementation
Flexible, smooth integration between Sara and new CMS, kicking off transition ahead on caseloads.

With Sara: gathering data, streamlining and saving time on communication & documentation.

Why local governments switch CMS providers

According to the "2023 CompTIA Public Technology Institute (PTI) State of City and County IT National Survey" 46% of U.S. local governments had made the infrastructure shift from on-premises to private cloud, while 43% had shifted to public cloud. Seventy-five percent reported that they'd transitioned from local applications to cloud-based Software-as-a-Service (SaaS) according to the same survey. We all know the heavy cost this once-in-several-decades shift represents in terms of budget, workflow management, and productivity.

In addition to modernizing, some organizations switch CMS providers because they're limited by their current provider's feature set, support, turnaround time and/or cost around change order requests, or overall cost.

Recognizing and documenting what doesn't work about a current software solution can be easier than recognizing and documenting what is needed in place of it.

1 Determining CMS requirements based on practice, not theory

Many case management systems boast similar features. Beyond the obvious, those your teams will need for compliance, which ones will save your people time and deliver better client outcomes? Undefined or murky requirements can result in:

- Spending more than necessary on the CMS software.
- Data/compliance risk inherent in the transition: Structure, data and mechanisms need to retain their integrity.
- Increasing duplicate processes across systems, which wastes case managers' time
- Asking staff to adapt their workflows to the software rather than to their and their clients' needs

Agencies that adopt Sara are able to work more efficiently in the near term while learning what features they need from a CMS. In other words, they can map learnings directly to RFPs so they make the best decision for their organization. In fact, existing Sara customers have included "integration with Sara" as a business requirement for their CMS RFP.

2 *Establishing best practice workflows and more productive teams*

Successfully shifting to a new CMS requires organizations not to simply "use this new software" but to adopt best practices so that they receive the full, as-advertised benefits. There's a healthy list of considerations for management as they prepare for the transition, and build best practices around them:

- New CMS features can change existing workflows that are currently working well.
- Changes will likely necessitate an update of procedures and policies.
- Logistics will need to be determined for staff training.
- Productivity during the transition is likely to be impacted.
- Changes could impact the intake process for participants.
- Facing two simultaneous software training processes (e.g. CMS and Sara) will be more daunting for those who are already change-averse or simply overwhelmed with their current caseload.
    - If you are working with an old CMS in parallel while rolling out the new, account for those log-ins and processes.

Sara adds routine caseload documentation and communication efficiencies to teams' existing workflows so that they see early evidence of how the software will make their days easier. These lifts empower organizations to tackle the CMS upgrade with wins under their belts and with data for management to report "up the chain."

Taking advantage of Sara's features now, making the months leading up to transition more productive

Among Sara's many time and cost-saving features are:

- Automatic case note generation and synchronization with both current and future system of record
- Appointment notifications and reminders (otherwise manually entered and not tied to a record)
- A single point-of-entry and record for all client communications instead of multiple third-party solutions for text/email, document retrieval, e-signing, virtual appointments, etc. (lighter lift for case managers, and a better experience for clients)

3 *Enabling more successful human services outcomes*

Today's human services clients, like any clients, expect consistency and ease when they communicate with a business or organization. They expect streamlined, well-planned technology experiences to help them onboard and handle any back-and-forth. These pleasant and streamlined experiences are made possible by a high degree of automation and flexible systems that do the work of getting data where it needs to go rather than expecting clients or staff to do that work manually.

Cumulatively, better-designed and automated experiences result in more clients being served, and more agencies able to deliver on their stated missions. Sara serves as the frontline ambassador, providing a smooth, uninterrupted experience for clients and staff while the tough work of transitioning to the new CMS takes place behind the scenes.

The Nevada Department of Employment, Training & Rehabilitation (DETR) Bureau of Vocational Rehabilitation adopted Sara during a time when their industry was hit with a 20% staff vacancy.

***Results:* Sara contributed work *the equivalent of 65 additional full-time employees* for the *cost of seven*. With a full year of quantifiable efficiency gains and successful outcomes in their sails, DETR transitioned from a homegrown CMS to a cloud-based system.**

"Sara was the tool that we could use that allowed us to communicate without using personal resources. It was wonderful during the pandemic."

- Sheila Rasor, Business Process Analyst for DETR

Sara + New CMS: What the transition looks like

Sara integrates with any CMS and allows your organization to continue to do their work, uninterrupted. You can integrate with your new CMS in a couple of different ways, according to your needs:

1

Continue using Sara while working with your old and new CMS, in parallel.

Rationale: **Agencies choose this path in order to offset any potential CMS failure.**

2

Stand up your new CMS and leverage Sara's technology to bring existing case data.

Rationale: **Agencies choose this path in order to lessen the training and workflow burden on staff, speeding the transition overall.**

Taking Sara for a test drive

Sara leverages a time-tested model of rolling out new software: First, we provide your team with a User Acceptance Testing (UAT) environment that they can preview and interact with before switching to ensure that the API and data transfer are successful. The next step is promoting that view to pre-production. When your whole team is feeling confident, it's time to go live into production.

Frequently asked questions

What's the first step in getting Sara integrated with the new CMS?

The SaraWorks Team works with you to determine if you'll be setting up an additional instance of SARA sync or bringing in additional data from additional sources. The full Sara implementation takes around 30 days.

What happens to historical data?

Your case history will migrate from old CMS to new. All clients, up to 7 years back will transfer along with associated forms, letters, document management, and e-signatures.

Do we need to retain our system of unique IDs for client records?

Most agencies choose to retain their existing format for managing unique client records. We have had instances of states changing their existing format. In these cases, we simply ask for a CSV file with client records in order to make a bulk update.

Does my team have to do a separate input into Sara?

No, since Sara's API service sits between Sara and your CMS, the only workflow change will be that they'll use the new CMS for input. The data, features, and reporting from Sara will still be available.

Will clients receive uneven services (feel the CMS transition)?

If you have Sara implemented ahead of your CMS upgrade, no, they will not! Your staff can leverage features like Sara's bulk messaging to announce the CMS change with a delivery that feels familiar to them, while saving time with that communication. Your counselors will also have continuity in communicating with clients should any outages with your CMS occur, or should clients have questions about the switch.

Conclusion

Change is inevitable as user-friendly, more cost-effective cloud software makes work easier for case managers. But given the reality of the caseload they will continue to face, coupled with the time to select and transition to a new CMS solution, consistent outcomes can only be achieved with significant help. Sara digital assistant provides that help. Sara helps teams gather the right requirements, select the best-aligned CMS vendor, provide a smooth transition for both staff and for clients, and deliver better client outcomes throughout the process. The ROI on implementing Sara will be actualized before your team's first CMS training login and continue for as long as your team uses it.

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Public Technology Institute (PTI) State of City and County IT National Survey. CompTIA. FusionLP.org. Web. Accessed 20 September 2023