Are Clients Slipping Through the Cracks?
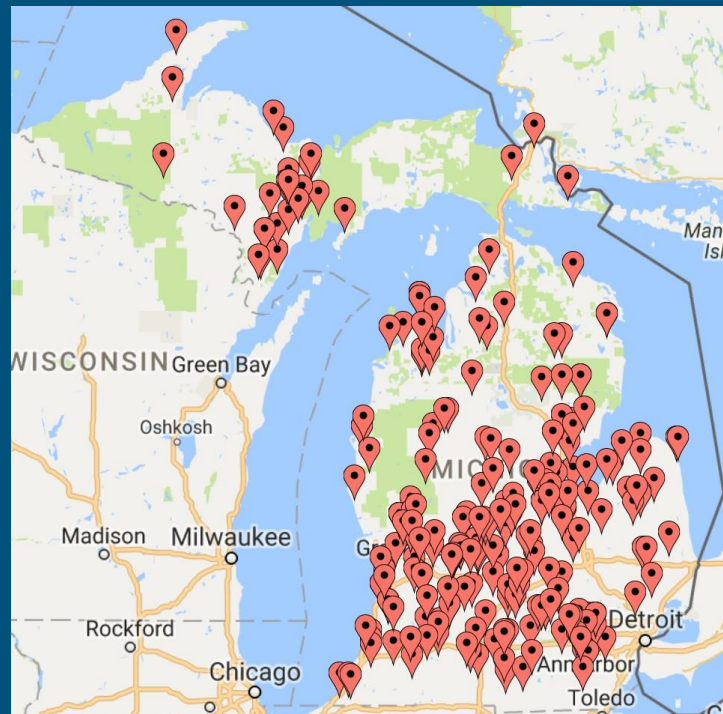
Candiss Leathers, Colorado AgrAbility
Ned Stoller, Michigan AgrAbility
Kyle Haney, Georgia AgrAbility

Michigan AgrAbility

Michigan AgrAbility is a partnership between Michigan State University Extension and Easterseals Michigan.

12 hours drive between clients.
70 new clients per year.

How do you keep it all straight?

- 150 or more clients contacted annually by
- multiple staff from
- different organizations in
- different locations, it is very likely that individual clients might slip through the cracks!

Lets talk about it, how do YOU keep track of it?

How do you share files and work together remotely? Vote in the chat…

- Office 365?
- Google Drive?
- Box?
- VPN?
- Dropbox?

Triage

Who is the highest priority person to follow up with when time is short and to-do lists are long?

Timely

Make sure clients are getting timely services, without rushing past them, keep good case notes, work together statewide, and not let the clients get lost in the shuffle…

CiviCore Case Management software

Candiss Leathers will share how Colorado AgrAbility uses CiviCore (now Neon One) case management software. Ms. Leathers was raised in the rural plains of Eastern Colorado in an agricultural setting and has worked in the field of Vocational Rehabilitation and Disability services for over 40 years. She has served as Project Manager for the Colorado AgrAbility Project for the last eight years, serving farmers and ranchers affected by an injury, long term illness, or other functional limitations to remain involved in agricultural work by providing direct services, information, and education. As Project manager she is responsible for the oversight of the management of the day-to-day operations of the AgrAbility Project.

Colorado AgrAbility

CiviCore (now Neon One) case management software provided by Goodwill. $8000 up front, $1080/year for AgrAbility hosting cost + $80/hour for edits to the database, $1500 one-time training. Every client is entered into it with demographic information. Candiss can query the data to pull reports. All staff can look at the database and they use outlook calendar to schedule clients site visit, 2 weeks later enter follow up report, and 2 weeks later for follow up. Everyday check calendar to see what is coming and post follow up to do items. Monthly review of clients with supervisor.

Michigan

Excel, Excel, filter & sort

Case files on Office 365 and we each generally manage our own clients.

Excel — AgrAbility > AgrAbility — AgrAbility Casenotes 09-2019 - Saved

File | Home | Insert | Formulas | Data | Review | View | Help — Open in Desktop App — Tell me what you want to do

Calibri | 11 | General

D7029 — Ned will stop by 3/12 to get hog and gate equipment.

	Name	Date	Staff Initials	Activity/Recommendations	Total Time Spent	Next action date
7028	Piepkow	2/27/2020	NS	New Intake. He is partner at Double Eagle Farms and has severe allergies and needs respirator when handling grain. They raise 3000 acres of corn, soybeans, and wheat. All three partners have respiratory impairments from asthma or allergies. Ned will see about getting him a Cleanspace respirator.	0.2	3/13/2020
7029	Day	3/4/2020	NS	Ned will stop by 3/12 to get hog and gate equipment.	0.1	3/12/2020
7030	Buchler	3/5/2020	NS	MRS: Follow up about what will happen at farm assessment.	0.5	3/12/2020
7031	SmithC	2/28/2020	NS	Visit to Kietzman farm to look at asparagus harvester. He will build one for $15,000 for 2021 production year if needed. He is too busy for this year. It picks long and short stems, he just sorts it and sells different sized bundles all for the same price. Some people like the shorts, others the longs. Sent follow up letter and recommendations.	1.2	3/12/2020
7032	JonesS	2/25/2020	NS	Called to set up visit when up north with Bernard. Message and set up database.	0.5	3/12/2020
7033	Quick	2/27/2020	NS	Message about physical and schedule F.	0.1	3/12/2020
7034	MillerT	2/27/2020	NS	He needs help planning taxes for 2019 so he can be eligible for MRS for help with an accessible shop.	1.5	3/12/2020
	Detson	3/23/2020	NS	He will be home 3/11 for cattle headlock delivery. Ned needs to write bale	0.1	

2012-2019 activity notes | 2018 data clients

Client demographics and reporting

	A	B	E	F	G	H	I	J	K	L	M	N	O	P
1	--	Client ID #	SR AP st	County	Heard of us?	Grant yr.	Client's status	Client Entry date	Client Exit date	Age	Client sex	Description	Work Status	1st operation
2	18 April served '19 March	Case ID Number	Cli en tSt at e	County Code	Heard of us?		Client Status	First Contact Date	Date case closing survey questionnaire sent	Age		Client Desc.	Work Status	Ag Operation
8	yes	2014-006	36	26043	5	2018	3	10/7/2012		70	1	1	2	5
14	yes	2014-012	36	26157	5	2018	4	10/25/2011	12/14/2018	63	1	1	2	8
18	yes	2014-016	36	26059	5	2018	3	7/30/2014		77	1	1	2	2
20	yes	2014-018	36	26073	5	2018	3	3/24/2014		69	1	1	3	2
22	yes	2014-020	36	26065	3	2018	4	7/18/2012	12/13/2018	73	1	1	2	13
23	yes	2014-021	36	26139	2	2018	4	9/3/2013	12/13/2018	65	1	1	1	6
32	yes	2014-030	36	26041	2	2018	4	9/15/2006	1/18/2019	63	1	1	2	9
33	yes	2014-031	36	26159	5	2018	3	9/8/2003		70	2	1	2	9
43	yes	2014-041	36	26077	3	2018	4	12/9/2014	12/14/2018	63	2	2	4	5
45	yes	2014-043	36	26019	3	2018	3	12/9/2014		65	1	1	2	5
50	yes	2014-049	36	26161	5	2018	3	7/17/2013		54	1	1	2	6
51	yes	2014-051	36	26033	2	2018	3	10/15/2013		46	1	10	1	12
52	yes	2014-052	36	26159	2	2018	3	8/19/2013		77	1	1	2	2

Client database | dropdown lists | Tables

ASANA project management software

Kyle Haney will explain how Georgia AgrAbility uses ASANA. He is an Extension Educator with the University of Georgia. In his role with Georgia AgrAbility, he is the North Georgia Field Service Coordinator. Kyle started working with AgrAbility in 2017 as an engineering student to develop a way for farmers to hook up implements without leaving the seat of their tractor. He has a passion for working with farmers and creating solutions and technology for problems that they face.

- Asana is a ***cloud-based*** project management program that allows organizations to manage, collaborate, and organize projects and corresponding tasks.

- Georgia AgrAbility has been using Asana since 2015.

- Reasons that we use Asana
  - Virtual
  - Easy to Use
  - Secure
  - Free

Few things to keep in mind....

- Asana is **project based and not data based**. That means it is likes information versus numbers. You may still need excel and other systems to track data.

- Your **AgrAbility clients** will be treated in Asana as individual "**projects**".

![AgrAbility in georgia logo]

Benefits of ASANA for AgrAbility

- Keeps most information in one place.

- Accessible to anyone in group from computer or phone

- Can assign task by person and it will notify the team member.

- Can choose who can be notified on each client (i.e. PI) which will send email updates so members stay informed.

- Continuity with staff transition.

- FREE Option

Asana Interface

Template New Farm

Overview | List | Board | Timeline | Calendar | Dashboard | Forms | More...

+ Add task

Task name

▼ Personal Information

- ✓ Intake Form
- ✓ Farm Address
- ✓ Release of Information - Pending
- ✓ Photo Release Form - Pending
- ✓ Liability Release Form - Pending
- ✓ Doctor Release Forms (VR Clients)- Pending
- ✓ VR Release Form- Pending
  - Add task...

▼ Plan Steps

- ✓ Send Welcome Letter (within 2 days of intake) KM
- ✓ Initial Site Visit (within 2 weeks of intake)
- ✓ Internal Site Notes (within 3 days of initial site visit)
- ✓ Formal Recommendation Report (within 5 days of initial site visit)
- ✓ QOL Pre- Survey (within two weeks of initial site visit) PT
- ✓ VR Referral (within 10 days of initial site visit) PT
- ✓ QOL Post-Survey (Date TBD) PT
  - Add task...

▼ [] ACTIVITY LOG - INPUT ALL CONTACTS HERE:

- ✓ Notify Client of QOL
- ✓ Notify Paige of client's interest in QOL

Sidebar navigation:
- Home
- Tasks
- Inbox
- Portfolios
- Goals

Show more

Reports

Agrability +
- Learn how to use Asa...
- Template Existing Farm
- Template New Farm
- County Extension Emails
- VR Forms
- IHDD & Group Events
- *RESOURCES*
- *RESOURCES* Winery
- AgrAbility Listserve Emails
- Call Log/Potential Clients
- Call/ Email Log General
- Community Partners and...
- AT Spotlights
- Client Spotlights

We developed a template that has sections for information. You can upload photos and documents. You can assign steps to individuals. Selected staff can be alerted anytime there is an update.

Personal Information

Plan Steps (with Deadlines)

Activity Log (Most used)

Business Plan Information (If Start-Up)

▼ [Name] Business Plan Development

- ✓ Initial Welcome Letter with Suggestions
- ✓ Cottage Industry Research Form - Pending
- ✓ Business Plan Worksheet (18, 24, 25) - Pending
- ✓ Business Plan (Drafts and Final)
- ✓ Mail Phase 1 Packet
- ✓ Mail Phase 2 Packet
- ✓ Mail Phase 3 Packet
- ✓ Mail Phase 4 packet
- ✓ Mail Phase 5 Packet
- ✓ Mail Phase 6 Packet

AgrAbility in georgia

asana

Template New Farm ⌄ ⓘ ☆ ○ Set status

Overview · List · Board · Timeline · Calendar · Dashboard · Forms · More...

+ Add task ⌄

Plan Steps

⊘ Send Welcome Letter (within 2 days of intake) KM

⊘ Initial Site Visit (within 2 weeks of intake)

⊘ Internal Site Notes (within 3 days of initial site visit)

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- Community Partners and...
- AT Spotlights
- Client Spotlights

⊘ VR Referral (within 10 days of initial site visit) PT

⊘ QOL Post-Survey (Date TBD) PT

    Add task...

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Plan Steps (with deadlines). We agreed internally to deadlines certain things are due (Site visit, site visit notes, referral to VR, etc). Based on that, we go ahead and assign some due dates at the time we are setting up the project.

AgrAbility in georgia

asana

Template New Farm ⌄ ⓘ ☆ ○ Set status

Overview | **List** | Board | Timeline | Calendar | Dashboard | Forms | More...

+ Add task ⌄

Task name

▼ **Personal Information**

- ⊘ Intake Form
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Add task...

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QOL Post-Survey (Date TBD) PT

Add task...

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Home
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box ●
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⚇ Goals

Show more

Reports ⌄

Agrability +

- Learn how to use Asa... 🔒
- Template Existing Farm
- Template New Farm ...

Client Spotlights

Activity Log (Most used)

Every call and contact goes here

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asana

[Name] Business Plan Development

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- ⊘ Mail Phase 6 Packet

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If someone is a new start-up, we have an expanded template for them.

AgrAbility in georgia

Important - You will rename your template as the farmer you are creating it for. *You do not want to overwrite your template file*.

Lets talk about it, what works for you?

Do you have challenges with these…
- Office 365?
- Google Drive?
- Case management software?
- Project management software?