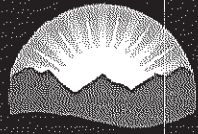


## Integrated Case Management (ICM)

- The Integrated Case Management project is an initiative between the Ministries of Social Development, Children and Family Development and Citizens' Services to replace outdated and inflexible information systems used to deliver critical social programs such as child protection services, child care subsidies, income assistance and employment programs.
- At present, information systems that were custom-built almost three decades ago have been modified, patched and extended over the years to meet changing business needs and are now obsolete and struggling to support the complex range of services delivered by each ministry.
- Integrated Case Management will introduce better tools for front-line workers and service delivery partners, and support the business transformation underway in each ministry. This will result in better outcomes for clients, through coordinated planning, consistent service standards, appropriate information sharing, and service delivery options.
- ICM will ensure critical case information is safe, secure and accessible, to protect and support the citizens of British Columbia.
- ICM will improve the way both the ministries of Social Development and Children and Family Development manage client information and deliver services.
- Clients will no longer be asked for personal information multiple times and services will be based on up-to-date comprehensive information.
- The cost of the project is \$181.8 million over six years.
- The Province has purchased state-of-the-art software and entered into a six-year agreement with Deloitte Inc. to develop and implement the Integrated Case Management solution.
- The ICM project is taking a 5 phased approach with Phase 5 scheduled to be completed in late 2014.
- Phase 1 was implemented on November 29<sup>th</sup>, 2010 on time, on budget and within scope.
- The new system will enable us to link public spending to client outcomes – resulting in improved accountability and transparency in the social sector and provide crucial information to support social policy and program changes.
- The ministries of Social Development and Children and Family Development spend \$3.4 billion annually on key social programs such as child welfare, child care, services for children with special needs, income assistance, and employment programs. These services are delivered by 4,000 front line workers and over 12,000 contracted service providers (including foster parents) and delegated Aboriginal agencies with over 25,000 employees. More than 200,000 individuals and families access these services every year.



**BRITISH  
COLUMBIA**  
The Best Place on Earth

**ICM**



# **ICM Overview**

## **May 19, 2011**

# Purpose of Today's Session

1. Provide ICM background
2. Review practice change process flow
3. Review basic ICM architecture & process flow
4. Use Virtual Views of the ICM System to demonstrate functionality for Phase 2
5. Answer your questions

## Vision for Integrated Case Management

The *right information to the right people at the right time*, in a secure manner that *protects privacy*, to *improve outcomes for citizens* through the *cohesive delivery of social services*. This includes *timely access to personal information for front line staff* to facilitate provision of *services to citizens*, as well as de-identified aggregate information for research, evaluation and planning at the program, ministry and sector level.

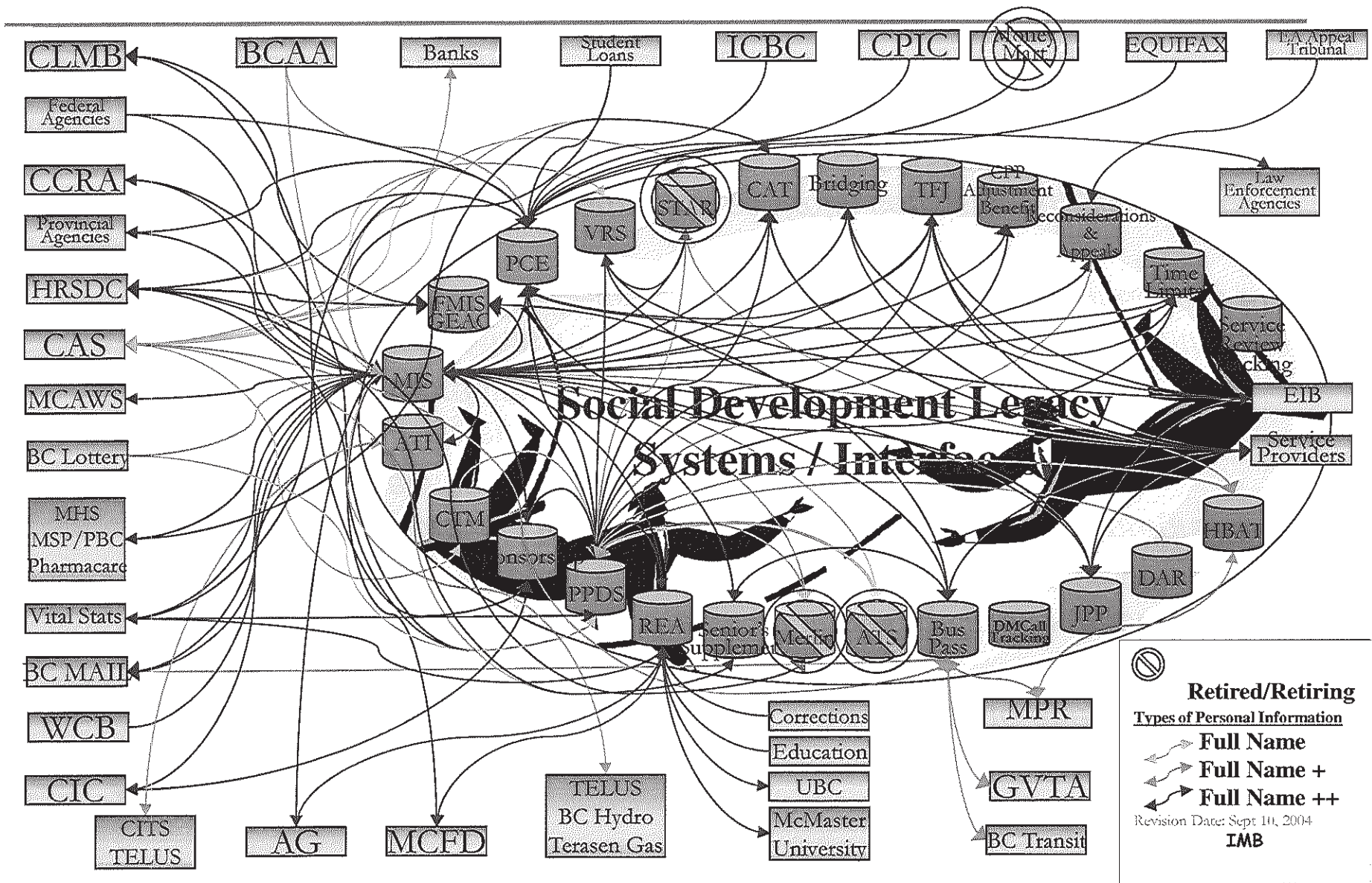
	From	To
<b>Integrated Information Sharing</b>	<b>From</b> Limited cross program and ministry information sharing focused on government structure	<b>To</b> Appropriate and secure information sharing (including service providers) focused on people and outcomes
	<b>From</b> Inconsistent information sharing practices and training	<b>To</b> Holistic, consistent information sharing practices and training with role based access
<b>Improved Access</b>	<b>From</b> Inflexible, complicated and siloed service delivery	<b>To</b> Integrated service delivery
	<b>From</b> Limited communication and access options (regional client and service provider )	<b>To</b> Broad range of provincial communication and access options for clients and service providers
	<b>From</b> Ministry determined business application and information architecture standards	<b>To</b> Interoperable, appropriate business application and information architecture standards
<b>Better Decision Making</b>	<b>From</b> Limited information decision making	<b>To</b> Evidence-Informed decision making
	<b>From</b> Inconsistent application of privacy legislation and policy	<b>To</b> Consistently understood and applied rules to provide protected, auditable appropriate privacy



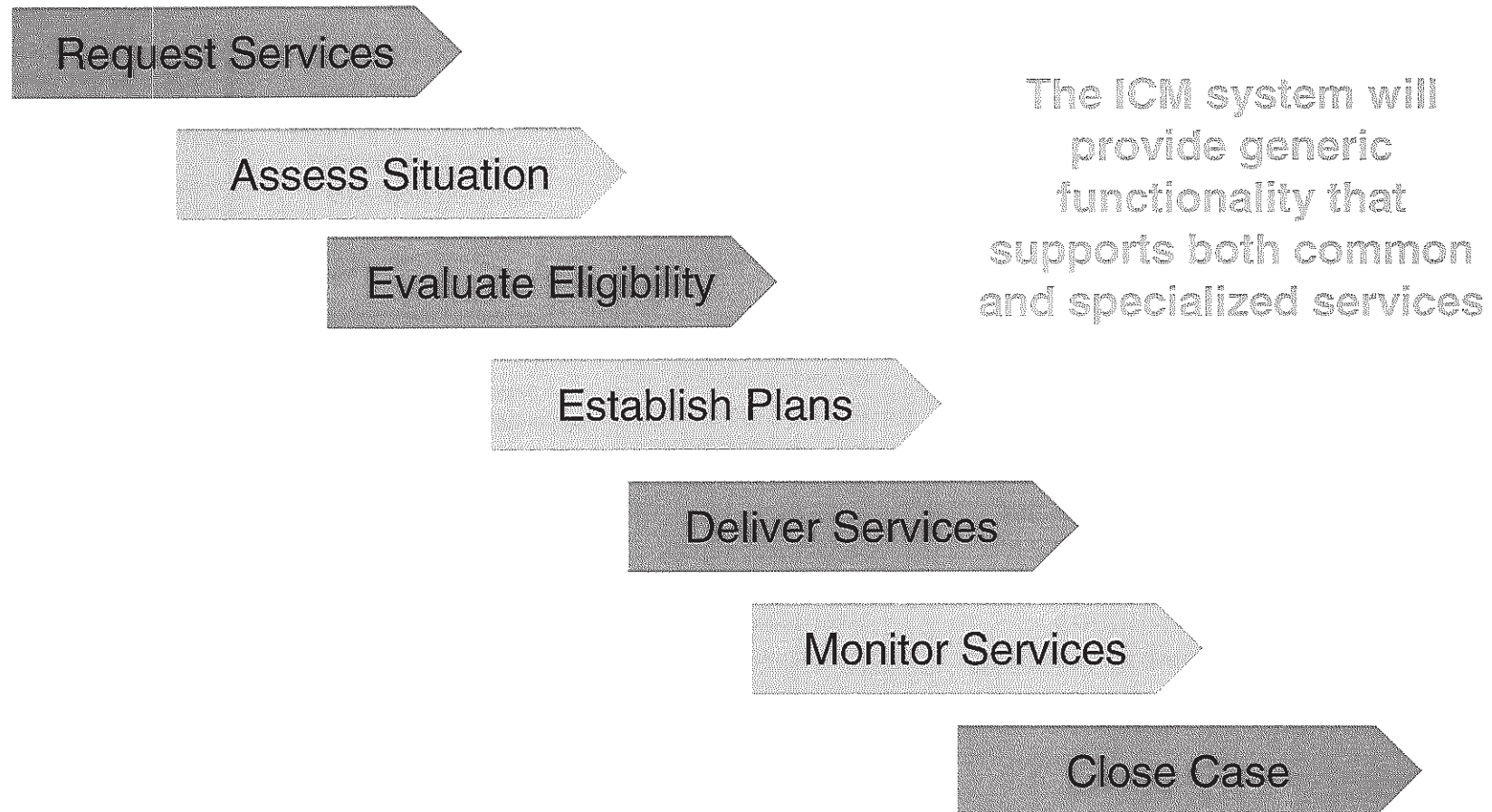
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## Key Objectives

- **Better Outcomes for Citizens** – *through improved access to effective services and coordinated planning;*
- **Business Transformation** – *provide the technology required to meet the Ministries' business requirements, innovation and the future workplace;*
- **Service Integration** – *provide integrated service delivery between programs and with contracted service providers;*
- **Tools for Staff** – *provide better tools and simplified business processes to enable staff to spend more time in direct delivery of services to clients;*
- **Appropriate Information Sharing** – *appropriate information sharing with all levels of government to provide better integration of services; client access to their own data;*
- **Privacy protection** – *improve information controls, consistent application of policy and better security to enhance the privacy of personal data;*
- **Replace Obsolete Systems** – *replace an aging and inflexible mission critical system (50+ ancillary systems).*

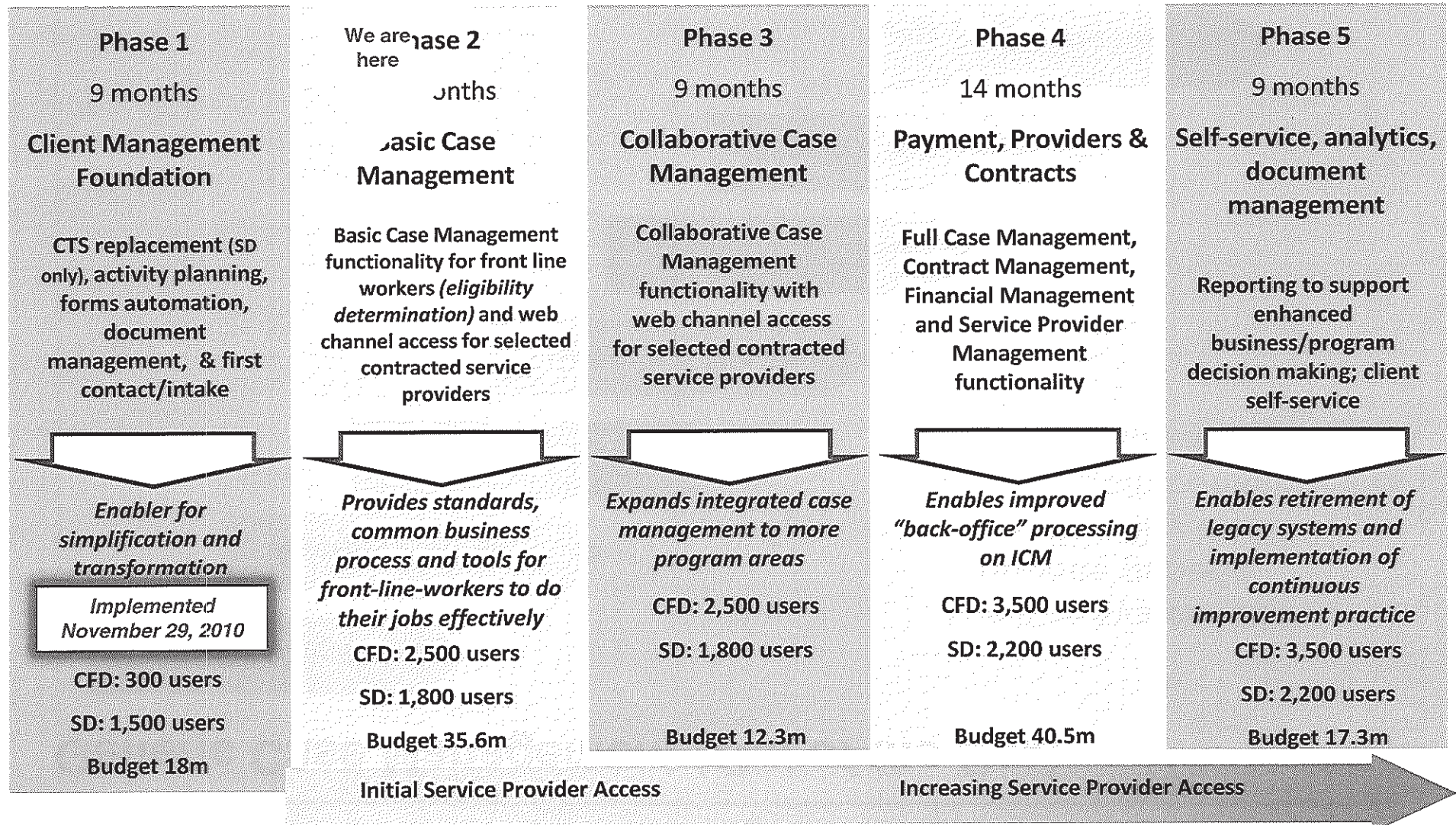


## Generic Case Management (*Out of the Box*)

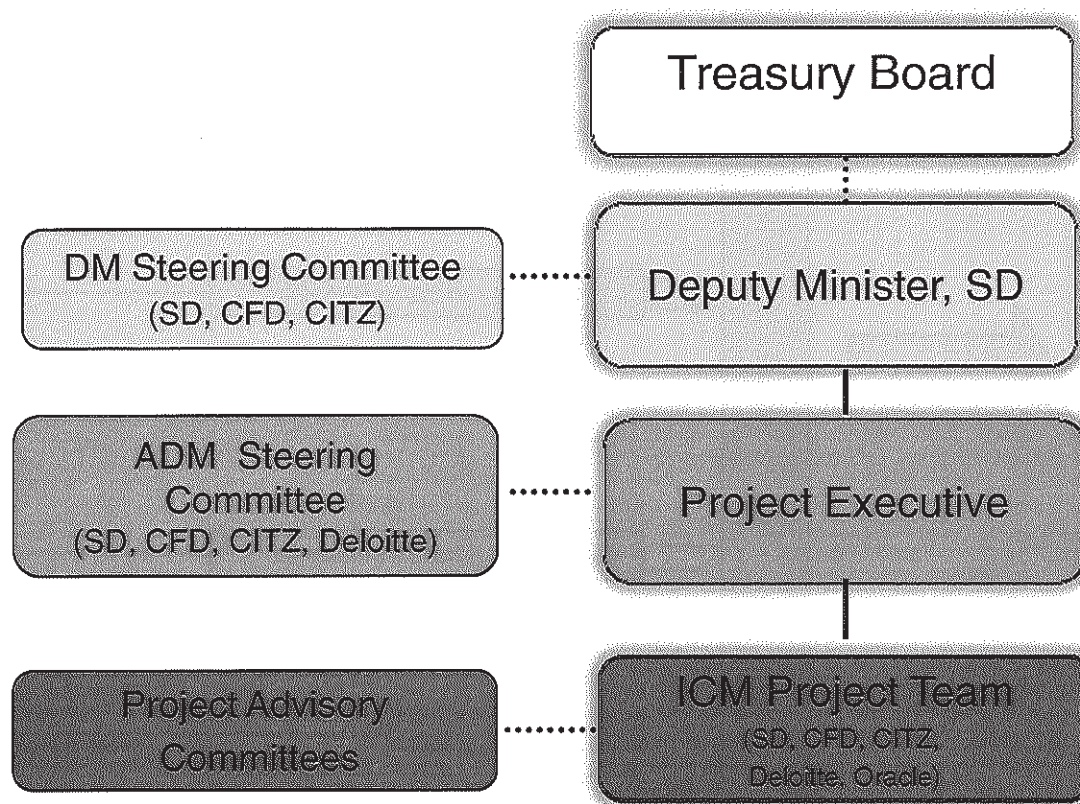




# ICM Project Timelines

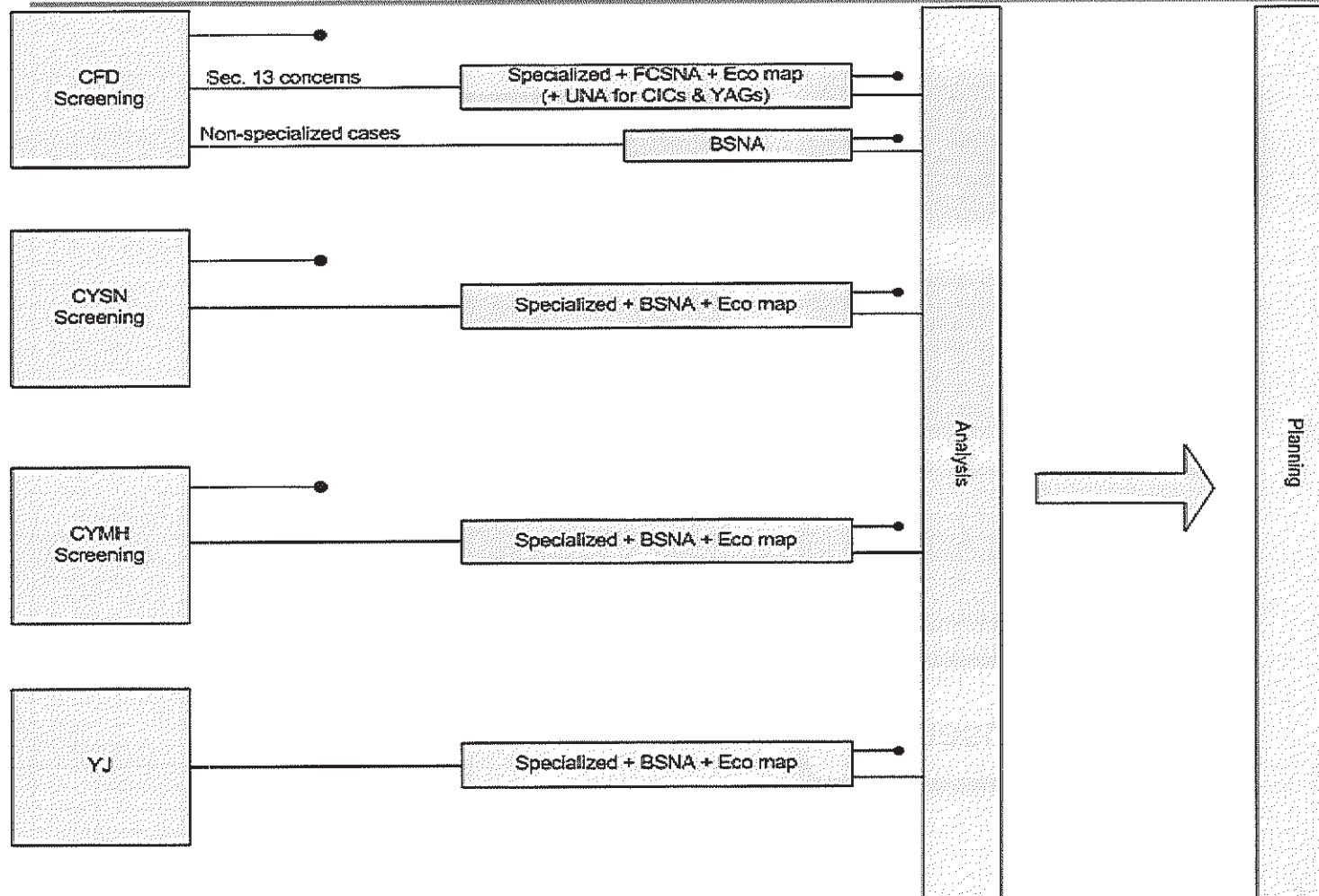


# Governance in a Multi-Ministry Project





## CFS PROCESS FLOW

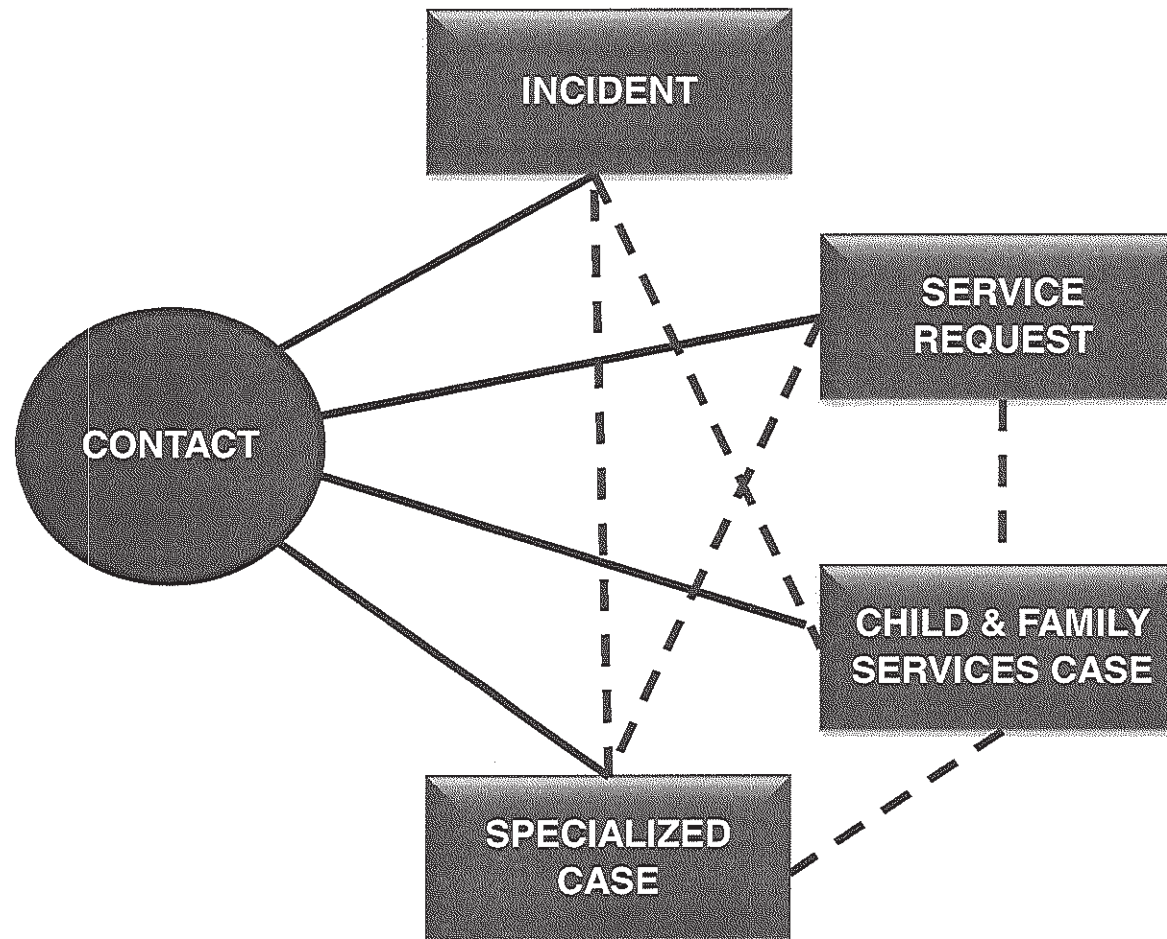


### Notes:

BSNA = Basic Strengths and Needs Assessment  
 FCSNA = Family and Child Strengths and Needs Assessment. (Used instead of BSNA in specialized child protection cases)  
 OSP = Offer Support Services  
 UNA = Universal Needs Assessment. Used only for children in care (CIC) and youth on Youth Agreements (YAGs)

# ICM STRUCTURE

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# CFS Scenario

# Contact Summary View

File Edit View Navigate Query Tool Help
ORACLE

Icons
Saved Queries: \*All Contacts

Home Calendar Cases Contacts Service Activities Attachments Incidents

Contacts Home | Contacts List | Consumers List

Bill Rooney
1 of 10

Menu New Delete Cancel Query

Last Name: \* ROONEY
First Name: \* BILL
Middle Name(s): T
Title:
Suffix:

AKA Last Name: ROONEY
AKA First Name: BILL
Gender:
Identity Verified: ☒

Date of Birth: 1986-Jun-03
Age: 24
Deceased: ☐

Person ID MIS: 1001323
Person ID ICM: 1-1719237
HSD Local Office:

Contacts Summary | Accounts | Activities | Identity | Income | Invoices | Notes | Service Requests | Profile | Authentication | Coverage Team | Addresses | Benefits |

Alerts Menu No Records

Type	Active	File Id	Office	Worker	Set Date	Alert Text

Service Requests Menu New Copy Query 1 of 1

	New	Overdue	Access	Restricted	Related SR	SR #	Case #	Priority	Due Date	Last Name	First Name	Type	Sub-Type	Sub
>	*	<input type="checkbox"/>		<input type="checkbox"/>		1-612503		2-High	2010-Sep-17	ROONEY	BILL	Health Sup	Natal Suppleme	

Cases Menu Add New Remove Query

Case Number	Case Name	Case Status	Last Name	First Name
> 00001206	Income Assistar Open		ROONEY	BILL

Assigned To Case Type

ICPs Menu Add New Remove Query

Plan Number	Plan Name	Plan Status	Last Name	First Name
> 1-21128053	Bill's ICP	Open	ROONEY	BILL

Assigned To Plan Type

1 of 4

# Contact Aboriginal View

File Edit View Navigate Query Tool Help ORACLE

Home 
 Cases 
 **Contacts**
 Service Requests 
 Activities 
 Attachments

Contacts Home | Contacts List

---

**Joe Bloggs** 1 of 10

Menu New Delete Query

Last Name: * Bloggs	AKA Last Name: Bloggs	Date of Birth: 1972-Feb-16	Person ID MIS:
First Name: * Joe	AKA First Name: Joe	Age: 38	Person ID ICM: 1-240751207
Middle Name(s):	Gender:	Deceased: <input type="checkbox"/>	
Title:	Suffix:		

---

[Contact Summary](#) | 
 [MIS More Info\(SD\)](#) | 
 [MIS More Info\(CFD\)](#) | 
 **[Aboriginal](#)** | 
 [AKA](#) | 
 [Addresses](#) | 
 [Languages](#) | 
 [Attachments](#) | 
 [Notes](#) | 
 [Identification](#) | 
 [Activities](#) | 
 [Profile](#) | 
 [Income Details](#) | 
 [Assets](#) | 
 [Consent](#) | 
 [Audit Trail](#)

---

Menu Query Best Practices

Possibly Aboriginal: <input checked="" type="checkbox"/> Living On Reserve: <input checked="" type="checkbox"/> Living Community/Band: 642 Cowichan Tr Local Protocol: <input checked="" type="checkbox"/> Band Phone #: <input type="text"/> Band Fax #: <input type="text"/> Person Contacted: John Henry Delegated Aboriginal Agency Involvement: <input type="text"/> Mother Registered: <input checked="" type="checkbox"/> Mother Community/Band: 642 Cowichan Tr	Father Registered: <input checked="" type="checkbox"/> Father Community/Band: 642 Cowichan Tr Aboriginal Origin Code: 1st Nation Registration Stat Number: 123 Registration Status Code: Registered Band/Community of Origin: 642 Cowichan Tr Origin Band Phone #: <input type="text"/> Origin Band Fax #: <input type="text"/> Associate Numbers: <input type="text"/> Other Ancestry: <input type="text"/>	Metis Status: <input checked="" type="checkbox"/> Metis Membership No: <input type="text"/> Metis Provincial No: <input type="text"/> Metis Local No: <input type="text"/> Aboriginal Clan / Family Status: <input type="text"/>
--	---	--

# Service Request List View

File Edit View Navigate Query Tool Help ORACLE

Icons: [Home] [Calendar] [Cases] [Contacts] [Service] [Activities] [Attachments] [Incidents]

Saved Queries: \*Current SRs

Service Requests Home | Service Requests Lists | Service Requests Charts | Service Request Reports

My Service Requests [Menu] New Copy Delete Query 1 of 1

New	Overdue	Restricted	Related SR	SR#	Case #	Priority	Due Date	Last Name	First Name	Type	Sub-Type	Sub Sub-Type
>				1-9330468		3-Standard	2011-Mar-12			Request Service	Child Care	Subs

1-9330468 1 of 1

Menu New Delete Query Copy Check In

**Service Request Information**

Restricted: ☐ Overdue: ☐ Related SR: ☐

Priority: 3-Standard

Due Date: 2011-Apr-12

Last Name: [Field]

First Name: [Field]

**Type and Ownership**

Type: Request Service

Sub-Type: Child Care Subsidy

Sub Sub-Type: [Field]

Start: 2011-Feb-10 04:00

Created: 2011-Feb-10 04:00

Owner: JKLEIN

Service Office: AGZ - TRAIL - CO

Local Office: [Field]

Contact Method: Web

Memo: [Field]

**Service Request Information**

Status: Open

Sub-Status: [Field]

Closed: [Field]

Resolution: [Field]

Resolution Description: [Field]

1 of 1



# Incident Details View

File Edit View Navigate Query Tool Help

Oracle

Saved Queries: All Incidents

Home Calendar Cases Contacts Service Activities Attachments Incidents ICP Cases

Incidents Home | Incidents List

9SIA-9U07L 1 of 1

Menu New Copy Query

Incident Information	Type and Ownership	Status and Resolution
Incident Number: 9SIA-9U07L	Type: Protection	Ministry: <input type="checkbox"/>
Priority: High	Sub-Type: <input type="checkbox"/>	Owner(s): ALEVINE <input type="checkbox"/>
Due Date: <input type="text"/>	Sub Sub-Type: <input type="checkbox"/>	Service Office: <input type="checkbox"/>
Date Reported: 8/20/2011 12:00 PM	Created By: JYU	Local Office: <input type="checkbox"/>
Date Occurred: 8/18/11 12:00 PM	Created: 8/21/2011 12:00 PM	Memo: <input type="text"/>
	After Hours: <input checked="" type="checkbox"/>	Resolution Description: <input type="text"/>
		Resolution: <input type="text"/>
		Closed: 8/21/2011 12:00 PM
		Sub-Status: <input type="text"/>
		Status: Open

More Info Activity Plans Activities Attachments Notes Related Incidents Contacts Contact Alert Cases / ICP Service Requests Accounts Audit Trail

Menu New Copy Query 1 of 1

Reporter Information

Reporter:  Address:  Phone:

Report Method:  City:  E-Mail:

Reporter Type:  Postal Code:

Preferred Contact Method:  Province:

Case Information

Case Name: GA485783 Case Number: 46850-16546401 Case Serial #:  Case Owner: LPERKINS

Contact Information

Last Name:  First Name:  Gender:  Date of Birth:

Account Information

Account Name:  Type:  Address:  City:

Best Practices Information

Aboriginal: ☒ Request Reply: ☒ Confidential: ☒

of 4

# Complaint Details View

File Edit View Navigate Query Tool Help ORACLE

Icons: [Home] [Calendar] [Cases] [Contacts] [Service] [Activities] [Attachments] [Incidents] [ICP Cases]

Saved Queries: All Incidents

Incidents Home | Incidents Lists

---

Menu New Copy Query

**Incident Information**

Incident Number: [ ] Days Open: [ ]

Priority: [ ] Location: [ ]

Due Date: [ ] City: [ ]

Date Reported: [ ] Postal Code: [ ]

Date Occurred: [ ]

**Type and Ownership**

Type: [ ] Organization: [ ]

Sub-Type: [ ] Owner(s): [ ]

Sub Sub-Type: [ ] Service Office: [ ]

Created By: [ ] After Hours: ☒

Created: [ ]

**Status and Resolution**

Status: [ ]

Sub-Status: [ ]

Closed: [ ]

Resolution: [ ]

---

Complaint Details Activity Plans Activities Attachments Notes Related Incidents Contacts Contact Alert Cases / ICP Service Requests Service Provider

Menu Query

Primary Category: [ ] Secondary Category: [ ] Description: [ ]

Primary Sub-Category: [ ] Secondary Sub-Category: [ ]

Involved Agency 1: [ ] Involved Agency 2: [ ]

Made by Youth: ☒ RCY: ☒

---

Menu Query

Level	Action 1	Action 2	Outcome 1	Outcome 2	Level Start	Level End
>						

---

Level Comments Menu Query

Comments: [ ]

of 4

# CFS Assessment View

File Edit View Navigate Query Tool Help

Home
 Calendar
 Cases
 Contacts
 Service
 Activities
 Attachments
 Incidents
 ICP Cases

Saved Queries: \*Open Cases

ICP Case List

Ashley's CFS Case

Menu

Query

Case Name: Ashley's CFS Case

Case Status: Open

Primary Contact: Ashley Rae Coates

Created Date: 2011-Jan-29

Case Number: 1-21125728

Assigned To: SELLIOTT

Ministry: MCFD

Last Update Date: 2011-Feb-17

Case Type: CFS

Office: 322 - Surrey North

Restricted: ☒

Assessments

Analysis

Plans

Notes

Attachments

Related Cases

Team

Activity Plans

Menu

New

Query

Assessment Date	Template Name	Status	Contact	Comments	Analysis ID	Created By	Created Date
> 2/17/2011	Strength and Needs Assessment	<input type="checkbox"/>	Ashley Rae Coates			SELLIOTT	2/17/2011
2/14/2011	Family and Child Assessment	<input type="checkbox"/>	Ashley Rae Coates			SELLIOTT	2/14/2011
2/14/2011	Universal Needs Assessment	<input type="checkbox"/>	Ashley Rae Coates			SELLIOTT	2/14/2011
2/11/2011	Basic Needs Assessment	<input type="checkbox"/>	Ashley Rae Coates			SELLIOTT	2/11/2011

Assessment Items

Menu

New

Query

Order	Category	Item	Response	Weight	Score	Total Score	Maximum Score	Add to Analysis
> 1	Altruism	Interpersonal Competence	Applicable	0	0	0	0	<input checked="" type="checkbox"/>
2	Altruism	Caring / Sharing Attitude	Applicable	0	0	0	0	<input checked="" type="checkbox"/>
3	Mastery	Learning	Applicable	0	0	0	0	<input checked="" type="checkbox"/>
4	Mastery	Social Interaction	Not Applicable	0	0	0	0	<input checked="" type="checkbox"/>

Item Comments

Menu

Query

Comments:

## Assessments in Phase 2

Assessment	Where located	Format	When
Universal Needs Assessment	ICP case – assessment screen	template on the assessment screen, can push to the analysis screen	as per policy, mandatory for youth agreements and kids in care
Basic Needs Assessment	ICP case – assessment screen	template on the assessment screen, can push to the analysis screen	as per policy, mandatory for all program areas
Immediate Safety Assessment	Incident - Type Allegation Protection, assessment screen	template on the Incident, cannot push to the analysis screen on ICP	When assessing a protection report
Family & Child Strength & Needs	FS Specialized case – assessment screen	template on the assessment screen, can push to the analysis screen	After a protective response, when developing a plan to address issues.
Vulnerability Assessment	Incident - Type Allegation Protection, assessment screen	template on the Incident, cannot push to the analysis screen on ICP	replacing the Comprehensive Risk Assessment, as per policy
Eco Map	ICP case – assessment screen	Could be a template on the assessment screen if formatted properly	as per policy
Risk and Resilience Scan	ICP case – assessment screen	template on the assessment screen, can push to the analysis screen	as per policy
Reunification Assessment	CS Specialized Case – assessment screen	template on the assessment screen, can have info pushed to the analysis screen on ICP	When considering returning a child home
Vulnerability Reassessment	FS Specialized Case – assessment screen	template on the assessment screen, can have info pushed to the analysis screen on ICP	when completed a plan to reduce risks



# ICP Assessment List Views

File Edit View Navigate Query Tool Help

Oracle

Saved Queries: \*Open Cases

Home Calendar Cases Contacts Service Activities Attachments Incidents ICP Cases

ICP Case List

Bill's CAPP Case 1 of 1

Menu Query

Case Name: \* Bill's CAPP Case Case Status: \* Open Primary Contact: Bill Rooney Created Date: \* 2012-April-01

Case Number: \* 1-21125728 Assigned To: \* KARMSTRONG Ministry: MCFD Last Update Date: \* 2012-April-01

Case Type: \* CAPP Office: 322 - Surrey North Restricted: ☒

Assessments Activity Plans Plans Notes Attachments Related Cases Team

Menu New Query 1 - 1 of 1

Assessment Date	Template Name	Description	Status	Assessment Score	Percent	Maximum Score	Comments	Created Date
> 2012-April-01	Basic Needs Assessm		In Progress	70	58.3%	120		2012-April-01
2011-Mar-22	Universal Needs Asse		Complete	60	43%	140		2011-Mar-22
2011-Jan-01	Basic Needs Assessm		Complete	75	44%	170		2011-Jan-01

Assessment Attributes Menu New Query 1 - 1 of 1

Order	Attribute Name	Value	Comment	Weight	Score
> 1	Food	High - Strength		1	15
2	Shelter	Low - Vulnerability		2	5
3	Clothing	High - Strength		1	15
4	Health / Medical	Low - Vulnerability		1	5
5	Social Safety	Medium - Getting By		4	10
6	Emotional Safety	Low - Vulnerability		1	5
7	Cultural Safety	Medium - Getting By		1	10
8	Physical / Sexual Safety	High - Strength		1	15

of 4

# CFS Analysis View

File Edit View Navigate Query Tool Help
ORACLE

Home
Calendar
Cases
Contacts
Service
Activities
Attachments
Incidents
ICP Cases

ICP Case List

Bill's CAPP Case
1 of 1

Menu Query

Case Name: \* Bill's CAPP Case

Case Status: \* Open

Primary Contact: Bill Rooney

Created Date: \* 2012-April-01

Case Number: \* 1-21125728

Assigned To: \* KARMSTRONG

Ministry: MCFD

Last Update Date: \* 2012-April-01

Case Type: \* CAPP

Office: 322 - Surrey North

Restricted: ☒

Assessments Analysis Activity Plans Plans Notes Attachments Related Cases Team

Menu New Query Retrieve Assessment
1 - 1 of 1

Status	Type	Date	Comments	Owner	Created Date	Contact
>						

Analysis Items Menu Query
1 - 1 of 1

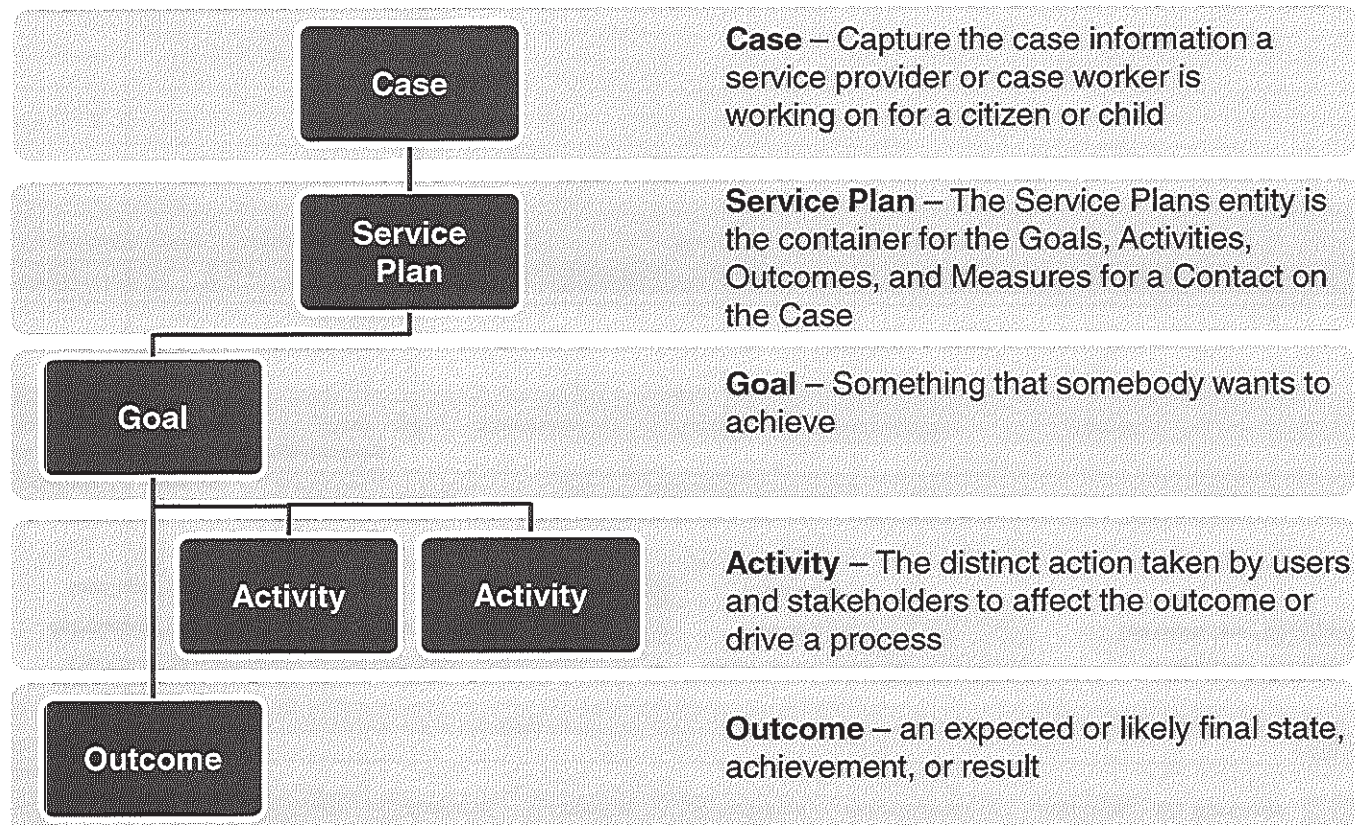
Assessment Template	Category	Item	Status	Status Comments
>				

Item Comments Menu Query
1 of 1

Comments:

of 4

# Goals and Objectives Structure





# ICP Service Plan View

File Edit View Navigate Query Tool Help

Oracle

Saved Queries: \*Open Cases

Home Calendar Cases Contacts Service Activities Attachments Incidents ICP Cases

ICP Case List

Bill's CAPP Case | 1 of 1

Menu Query

Case Name: \* Bill's CAPP Case Case Status: \* Open Primary Contact: Bill Rooney Created Date: \* 2012-April-01

Case Number: \* 1-21125728 Assigned To: \* KARMSTRONG Ministry: MCFD Last Update Date: \* 2012-April-01

Case Type: \* CAPP Office: 322 - Surrey North Restricted: ☒

Assessments Activity Plans Plans Notes Attachments Related Cases Contacts

Menu New Delete Query 1 - 1 of 1

Plan Number	Plan Name	Plan Category	Plan Type	Plan Status	Last Name	First Name
> 1-4249193	Bill's Plan			Active	ROONEY	KRISTAL

Service Plan Goals Menu New Delete Query 1 - 1 of 1

Name	Template	Planned Start	Planned End	Description	Status
> Nutrition	Improve Nutrition	2011-Feb-25	2012-Feb-25	Ensure Kristal has access to a safe and nutritious diet	In Progress

Activities Menu New Delete Query 1 - 1 of 1

Description	Type	Start	End	Status	Priority	Comment
> Breakfast Program	Referral	2011-Mar-1	2012-Feb-24	Pending	2-High	Enroll Kristal in school's healthy breakfast program
Parent Education	Appointment	2011-Mar-24	2011-Mar-24	Scheduled	3-Standard	Session on Canada's food guide

Outcomes Menu New Delete Query

Type	Operator	Target A	Target U/M	Description
> Missed Days	<=	5	Monthly	Reduce sick days from school.

Measures Menu New Delete Query

Actual	Achieved	Start Date	End Date	Comments
> 5	<input checked="" type="checkbox"/>	2011-Apr-1	2011-Apr-30	
7		2011-Mar-1	2011-Mar-31	

of 4



# Visibility and Privacy

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## Visibility and Privacy Considerations

ICM is a system that enables the responsible sharing of data across many users for a comprehensive view of the ministry clients, and any other Contact associated with either Ministry.

The profiles of each user have been developed with careful consideration by Ministry Executives and Privacy Experts with input from the business users.

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## **Key work underway by the Practice Change Team**

- Feasibility Study on Common Intake Model
- Further work on defining the multidisciplinary approach in Practice
- Further work to detail the 'Business of Practice' i.e., use of the Assessment, Analysis and Planning tools
- Defining the role of the Key Worker and developing that role in Practice
- Refining the Training curriculum in CFD based on Implementation Sites
- Training and evaluation on the Collaborative Response Model
- Development & implementation of the Clinical Supervision model and curriculum
- Supporting, evaluating and getting feedback from the Implementation Sites
- Integration of Practice work with ICM deliverables
- Commencing work to integrate the work of Practice with Quality Assurance
- Commencing work to integrate the work of Practice with Change Management

## Wrap Up

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## QUESTIONS

