PA Parent and Family Alliance

Using Casebook to digitize the human service delivery model

PA Parent and Family Alliance, a distributed organization serving greater Pennsylvania, provides support and advocacy for families raising children struggling with social, emotional, behavioral, or mental health challenges. As a fully remote organization prior to the pandemic, their organization is an example in the non-profit sector for its use of progressive, innovative ways to serve their growing clientele.

Before using Casebook in 2021, PA Parent and Family Alliance's Family and Community Support Coordinator, Kristin Grebey, was in search of a way to share data and insights centrally amongst her staff of 10, who work throughout the state. The team relied on digital technology to communicate but they struggled to scale existing human services software and had to supplement them with Excel spreadsheets in order to manage and track workload.

Grebey and her team faced an issue that plagues many small and large Human Services agencies - the accessibility of their data post-submission was severely lacking. According to Family Support Partner, Tracy Palazotto,

"Once it goes into the abyss, we were not able to see anything. So that was frustrating."

Palazzotto, one of three Family Support Partners, relied on printing case notes before entering them into their former case

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management system and filing them in a binder for future reference. This process made it time consuming or impossible for staff members to access the documents needed to support families effectively.

"[With our prior software,] I couldn't give my team permission to see their notes. They were printing everything out. Talk about wasting paper, right? But they would have to print everything out so that they could remember conversations they had with the different families they were working with because they couldn't see what they were putting into the database. It just was a mess." said Grebey.

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The PA Parent and Family Alliance's main goal is to expand its reach into more counties. Grebey knew that their current software was not a fit for their growing human service-centered processes. As a base requirement, she and her team had to access current and historical information about their clients and family members while in the field.

Greby continued, "[My team] couldn't see anything they filled out and I couldn't search through everything. I had to download the [entire database] and then sort it myself and pull that one case we needed. "

She knew that other commercial tools could serve this need, but after months of research, she was not finding a system that provided

the flexibility of a commercial platform with the base required for human services. After evaluating countless solutions, Grebey honed in on the importance of configuration - she needed to be able to adapt the tool over time as her team and clientele grows. Combining configurability with the accessibility of a commercial SaaS platform made Casebook Grebey's top contender and the ease of use and excellent customer service won her over.

"Casebook seemed so much more user-friendly compared to a lot of the different software that I looked at. It's so much easier than what I fear would have happened with a lot of the other different companies. The customer service alone is so much better than any of the other companies that we work with. We use a lot of different technology because we are fully remote, and Casebook by and far has the best customer support of everything we do."

With a truly digital human services-based platform, the pain points that PA Parent and Family Alliance were experiencing prior to Casebook have been eliminated. Grebey and her team of Family Service Partners have been able to expand their reach to more families while keeping the team size consistent. With Casebook, the PA Parent and Family Alliance team is able to better serve the families that they work with while reducing the number of hours spent on administrative tasks such as printing and filing case notes by 780 hours annually across her staff.

"I'd estimate that I'm saving at least five hours a week using Casebook. I would have to look up every person that I had, [then] to go to my folder [for the client…and] I [would] have to print whatever I was doing. So I would print every time I talked to them, what was said, what was written down and put it into that file," said Palazzotto.

Grebey considers Casebook a one-stop-shop for their organization and relies heavily on the data entered into Casebook by her team. Staff members are able to pick up where others left off which provides internal transparency and a seamless client experience.

Asked about the benefits of Casebook, Grebey replied, "Being able to jump in, search for a case, and [having the ability] to go back and read those case notes to know exactly what's going on with the case has been phenomenal for us."

"Casebook is lifesaving because we could go back on closed cases and still be able to see [all the notes] if we have to reopen it," added Palazzotto.

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About Casebook

Initially incubated by the Annie E. Casey Foundation, Casebook is a proven SaaS human services platform. Our technology solutions are the response to frustration among human services professionals and leaders who have struggled with antiquated information systems.

Casebook PBC is proud to be an AWS Partner. Our solutions are integrated with the AWS cloud, and developed to fully utilize its advanced storage and analytics services. Casebook PBC customers benefit from the scalability, ease of use, and high availability offered by AWS.

Want to Learn More? Let's Talk.

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