



Oregon Department of Human Services Uses Smartsheet to Administer Critical Programs through Centralized Tracking and Reporting

The Oregon Department of Human Services (ODHS) is the principal human services agency of Oregon. ODHS provides services including food and cash benefits, disability services, and support for children and families.

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Joey Razzano, Performance System Administrator
at Oregon Department of Human Services

Customer:

**Oregon Department
of Human Services**

Industry:

Government

Organization Size:

Large (1,000-9,999 employees)

Region:

North America

Website:

oregon.gov/odhs



The Oregon Department of Human Services (ODHS) is Oregon's principal agency for helping Oregonians achieve well-being and independence. As the largest agency in the state, ODHS determines eligibility for people applying for and receiving aid. ODHS extends its services to more than one million people through programs like Aging and People with Disabilities, Child Welfare, Developmental Disabilities Services, Self-Sufficiency Programs, Vocational Rehabilitation, and the Oregon Eligibility Partnership.

Background

Technology plays a key role in the agency's daily work, and ODHS wanted to find a cost-effective and secure solution to manage its programs and simplify reporting. *"Cost is important to any government agency, as funding streams can be limited and money is not always guaranteed,"* says Joey Razzano, performance system administrator, ODHS. *"In addition, we have to protect personally identifiable information, which is confidential and sensitive data about individuals."*

Solution

Razzano had used Smartsheet in her previous role at the Oregon Health Authority and she helped adopt the platform at ODHS. *"I knew Smartsheet was not only easy to use, but also scalable and flexible,"* she says. Razzano quickly became the agency's Smartsheet expert, and different teams within ODHS approached her for help creating Smartsheet solutions. One of those teams was Vocational Rehabilitation, a federally funded program that provides services to people with disabilities to help them find jobs. The team needed a solution that would help better track and coordinate services with all school districts and contractors so that they could accurately report back to the federal government. *"The program was at risk of losing federal funding because we weren't reporting correctly,"* Razzano says.

The Vocational Rehabilitation team lacked centralized reporting capabilities, and it wanted to increase collaboration for employees. *"We are required to report to state and federal government agencies when it comes to our case management entities, but it was challenging to do that because we couldn't get our different systems to communicate,"* says Razzano. The organization also needed to streamline project management. *"We have people using different software and tracking tools, and they weren't able to collaborate effectively because they worked in silos,"* Razzano says.

After a contractor failed to deliver, Razzano was able to help the team quickly build a solution to better manage the Vocational Rehabilitation program in Smartsheet. *"When my manager described the functionality they needed, I knew Smartsheet could do it,"* she says. With Smartsheet, the team can more easily track approval steps with dozens of school districts across the state, provide real-time reporting each month for billing, and deliver accurate reports to federal agencies every quarter. *"We track every step and clearly show who needs services, their information, and if they meet the requirements,"* says Razzano. Smartsheet exports data including primary identification numbers each day from a different system to ensure consistent tracking of referrals and eliminate manual data entry. To provide visibility to regional coordinators and school districts, ODHS also created various dashboards with high-level views of schools,

Customer:

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contractors, and summary statistics for each case, using Dynamic View to only show the relevant billing information.

An intuitive, easy to use solution for case management

ODHS quickly created a comprehensive system for tracking and reporting on the Vocational Rehabilitation program. *"I built the Vocational Rehabilitation program approval tracking solution within two weeks because of the intuitiveness and ease of use Smartsheet offers,"* says Razzano. Once the tracking and reporting solution went live, Razzano learned that it met federal reporting requirements, ensuring the program would continue to receive needed funding. *"In fact, a federal agency mentioned that they suggested another state look at our solution because of how well it works,"* says Razzano.

ODHS also benefited from the flexibility of Smartsheet. *"The requirements kept changing as we were building the solution, and we were able to make adjustments as we went along because Smartsheet is so flexible and scalable,"* says Razzano. Additionally, Smartsheet dashboards help ODHS centralize case management processes for each separate district. *"We created a one-stop shop for each district, so there is now one place coordinators can go to view referral, reimbursement, and other forms,"* says Razzano. *"Many times, there are multiple places you need to go to find government forms and other information. With Smartsheet, we were able to embed all the forms right in the dashboard, which makes everything easier to find and more efficient for the districts."*

Empowering employees to be more efficient

Other ODHS staff members have the autonomy to create their own solutions in Smartsheet, instead of relying on the agency's information services department. *"Previously, we would have to wait months or even longer for information services to create something for us,"* Razzano says. *"It's easy to build something that works in Smartsheet, and it's also simple for our teams to learn. Instead of using four or five different programs to do something, we can do everything we need to in one place in Smartsheet."*

Additionally, Smartsheet provides a secure platform to help ODHS better protect personally identifiable information of individuals benefiting from each of its programs. *"I can't stress enough how important security is for us as a state government agency,"* Razzano says. *"We're very concerned with public records, and the Department of Justice has to approve any cloud-based service that has a click-through user agreement. We know we can meet these requirements with Smartsheet. Smartsheet constantly reassures us how secure the platform is, so we can better manage risk. That gives us confidence as we continue expanding this technology here at ODHS."*

In a Nutshell:

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