



**NORTHWOODS®**

# RFI Response

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WV Purchasing Division

State of West Virginia Child Welfare Information System  
CRFI # BSS2300000001

**Submitted by**

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**Presented to**

West Virginia Purchasing Division  
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**Date**

April 11, 2023



Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

State of West Virginia  
 Centralized Request for Information  
 Info Technology

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## Cover Letter

Northwoods Consulting Partners, Inc. (Northwoods) welcomes the opportunity to provide West Virginia Department of Health and Human Resources (West Virginia DHHR), Bureau of Social Services (BSS) with a response to its Request for Information (RFI) # BSS230000001 for a web-based communications system designed to facilitate communication between designated stakeholders who provide services to foster children. In accordance with the RFI's instructions, we have provided responses around Traverse®, Northwoods' proposed solution that will serve as West Virginia BSS' web-based communications system.

Social services agencies across the country—including those delivering foster care services—are committed to delivering the highest possible quality of service to foster children throughout their communities. However, as communication between the agency, foster parents, and foster care stakeholders remains difficult and critical case documentation is inaccessible, it becomes more challenging for these agencies to operate under existing businesses processes and still achieve desired outcomes. These challenges currently exist in the State of West Virginia and correspond with West Virginia BSS' desire to implement a web-based communications system for foster care.

We recognize that West Virginia BSS is gathering information on a communication system that will allow the agency to integrate the solution with the agency's existing CCWIS platform (PATH). Since its onset, Northwoods has championed the flexibility of modern technology solutions and has demonstrated through countless state and county implementations—including those in West Virginia—how modern technology can leverage human-centered communication systems to revolutionize how caseworkers function and interact with foster children, foster parents, and foster care stakeholders.

Traverse—a next-generation collaboration, content management, and mobile system of engagement—can serve as West Virginia BSS' foster care communications system. Specifically designed to influence how agency staff deliver services, Traverse facilitates collaboration with foster parents and stakeholders by providing robust portal functionality and integrating with CCWIS in order to provide users with the information they need regardless of location, giving workers more time to interact with foster children, foster parents, and stakeholders.

In partnership with an innovative social services agency and a dedicated workforce committed to change, a communications system featuring Traverse will modernize an agency from the bottom up. Please contact me directly if you have any questions pertaining to the enclosed RFI response or if you are interested in receiving a Traverse demonstration.

Most sincerely,

Steve Koenig  
Business Development Manager

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## Introduction to Northwoods

An innovator and national thought leader in social services, Northwoods has been automating and modernizing the content management element of social services through systems of engagement since 2003, deploying client scheduling solutions since 2004, providing mobile client engagement solutions for caseworkers in the field since 2012, and offering purpose-built systems of engagement serving as web-based communication solutions within social services agencies since 2016.

Northwoods' sole focus is revolutionizing the delivery of social services by creating and delivering modern technology solutions that enable workers—regardless of their location or connectivity—to deliver superior high-value work within their community. Beginning with our very first social services customer and continuing through today, we have focused all of our efforts on providing solutions that serve as catalysts to the core relationship that lies at the heart of social services agencies: the relationship between a worker and an individual in need. Our solutions are proven to empower agency staff to better serve their clients by facilitating collaboration between the agency, foster parents, and foster care stakeholders. Today, over 45,000 caseworkers, supervisors, clerical staff, and directors rely upon Northwoods solutions to deliver social services to a combined population of over 40 million people.

Northwoods' background is rooted in social services, as many of us are former front-line workers and supervisors. As a result, we keenly understand the pressures associated with siloed case documentation, inefficient means of communication with outside organizations or stakeholders, increasing caseloads, shrinking budgets, persistent turnover, evolving mandates, and endless paperwork, while striving to better meet the needs of historically underserved individuals in the community. Additionally, our background enables us to repeatedly serve as a state and county partner during extraordinary times of crisis. Social services agencies operating on dramatically reduced budgets during the Great Recession turned to Northwoods and our technology solutions to enable their staff—routinely functioning with fewer workers—to maintain critical client services. These agencies benefited from enhanced efficiency and continued compliance, while never being forced to sacrifice service delivery. More recently, agencies leveraging Traverse reported similar experiences when dealing with COVID-19 mandates that required workers to function remotely or in a unique capacity.

Moreover, we are passionate about serving social services agencies because, much like our customers, we are passionate about improving the lives of at-risk and historically underserved individuals in a proactive manner. We pride ourselves on helping agencies adopt transformative technology solutions that fit their unique needs.

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### Company Name

Northwoods Consulting Partners, Inc.

### Company Address

5200 Rings Road  
Dublin, OH 43017

### Number of Employees

121

### Awards and Credentials

- AWS Public Sector Partner
  - Pioneer Institute's Better Government Competition, honoring Northwoods' technology for child protective services workers
  - OnBase Platinum Reseller, awarded most recently in 2020
  - OnBase Diamond Support Partner, awarded most recently in 2018
  - Microsoft Certified Gold Partner, awarded most recently in 2017
  - Columbus CEO Top Workplaces, awarded in 2023
  - Columbus Business First Best Places to Work, awarded in 2016
  - Wonderful Workplaces for Young Professionals, awarded most recently in 2018
  - Great Place To Work® for Best Small & Medium Workplaces, awarded in 2018
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Our social services focus allows us to understand how workers must be able to collect, organize, share, and interact with the content of a case regardless of their physical location or data connectivity.

To support this mission, we offer a full suite of commercially available and commercial off-the-shelf (COTS) software solutions—including content management systems, client scheduling solutions, mobile systems of engagement solutions, and case discovery solutions. To date, we have successfully implemented Northwoods' solutions in more than 225 social services agencies in 13 states and one territory.

More specifically, Northwoods has a rich history of partnering with the State of West Virginia. We have designed and deployed state-specific technology solutions for West Virginia DHHR's Bureau of Child Support Enforcement (BCSE) and Bureau for Family Assistance (BFA) (previously Bureau for Children & Families, Family Assistance Division), and are currently in the process of assisting the State with migrating and consolidating its solution within more modern infrastructure. In addition, we have partnered with the State of Ohio to deliver Traverse—Northwoods' next-generation social services product that leverages comprehensive content and forms management, collaboration, worker mobility, descriptive analytics, and workflow technology—into the hands of agency workers.

While we continue to develop superior software solutions for social services agencies, it is our organizational capacity and responsiveness—coupled with our software—that make us unique and enable us to make a lasting difference. As mentioned throughout this document, many Northwoods employees have direct experience with West Virginia DHHR, including BCSE and BFA, resulting in an intimate knowledge of agency business units and business processes. Further, our executive leadership and product delivery teams spent years researching and developing technology solutions, frequently riding along with workers in the field to experience firsthand how critical services are delivered to at-risk populations within a community. This ongoing investment allows Northwoods to understand each state's unique practice model and service deliveries. As a result, we are well positioned to provide West Virginia BSS' communications system—featuring Traverse—in order facilitate communication between the agency, foster parents, and foster care stakeholders.

With a profound understanding of the needs and unique challenges of today's workers, Northwoods remains committed to supporting West Virginia BSS and its workforce as it navigates the ever-changing landscape of social services.



## General Information Being Sought

### RFI Requirement – Page 4

3.1.1. A description of a web-based communications system which shall facilitate communications between individuals providing services to foster children, including, but not limited to, requests from foster parents and responses to requests from staff of the Bureau for Social Services and its contractual designees; updates regarding foster child movement, visitation, and travel; schedules for court hearings, guardian ad litem meetings, and multidisciplinary team meetings; and other communications that may improve care for the foster child amongst designated parties with legal responsibilities to care for the foster child.

Social services agencies across the country—including those delivering foster care services—are seeking proven technology solutions that eliminate administrative burdens and modernize how agency workers, foster parents, and foster care stakeholders collaborate to deliver critical services. Every day, agencies must demonstrate how they meet mandated requirements (for example, demonstrating face-to-face engagements are completed according to policy, ensuring investigations are initiated within required timeframes, and so on). As these mandates expand and the need for services increase, agencies need best-of-breed technology solutions that increase caseload capacity and assist agency staff with collaborating with foster parents and foster care stakeholders, managing requests to and from stakeholders, documenting foster care case activity, preparing for court and other legal meetings, and enhancing the delivery of services to foster children.

Traverse was designed to meet the business needs of social services agencies, as well as foster parents and foster care stakeholders, and seamlessly integrate with existing CCWIS solutions. The resulting web-based communications system—featuring Traverse—provides workers, supervisors, and directors with the tools they need to produce more efficient and effective client-centered outcomes by accomplishing the following:

- Assisting with the coordination of efforts between the agency, foster parents, and foster care stakeholders.
- Facilitating proactive delivery of services to foster children.
- Aligning the agency’s communication technology with its existing CCWIS.
- Facilitating agency-wide access to critical case information needed to deliver superior services.
- Enhancing the accuracy and timeliness of case information entry into CCWIS.

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*“Northwoods’ Traverse has been very impactful and a wonderful tool for our child welfare services staff in providing a service to the endangered children of Yuba County. Traverse has increased our ability to process documents in the field and has allowed our staff to locate pertinent documents with ease. This has allowed our staff to focus more on “social work” by reducing our time spent processing paperwork. Traverse is a valuable tool that enhances our ability to assist families in providing safe, healthy, and nurturing homes to the children of Yuba County.”*

Tony Gordon, Deputy Director  
Yuba County, CA Health & Human Services

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- Understanding full case history in order to develop service plans and identify community resources.
- Facilitating client-enriched engagement, collaboration, and outreach.
- Allowing workers to share forms with foster parents and foster care stakeholders to be completed and signed.
- Retaining staff due to the functional and visual elements of a human-centered designed interface.

A technology product that provides a social services agency with these advanced benefits and delivers a rich user experience (UX) is referred to as a "system of engagement." Traverse is a next-generation system of engagement developed by Northwoods that is a collaboration and content management solution at its core. As a result, content and forms that are shared via the Traverse portal functionality are automatically added to its appropriate case file, eliminating the need for staff to have to search for and manually add information to a case file. In addition to collaboration and content management, Traverse provides forms management, mobility, workflow and case discovery functionality that directly supports West Virginia BSS' unique business needs.

Featuring a human-centered design that supports how agency workers aspire to work, Traverse facilitates meaningful interactions by enabling workers to spend as much time as possible delivering services, meeting with foster children and parents, attending court hearings, and more—while having access to the critical, detailed information they need on the child and case. Using Traverse, content is collected in the field in a context-aware manner and automatically synced, increasing worker efficiency and giving them more time to engage with children in the office, in the field, or while working remotely. It also enables other workers to easily retrieve critical case information uploaded by workers in the field.

Traverse also directly supports workers' ability to easily collect quality data—including photos, audio, video, documents, and electronic assessments, plans, and forms—improving case collaboration with foster parents and foster care stakeholders, reducing duplicate entry, increasing data quality, and enhancing the delivery of care to foster children. It leverages data and content collection, case discovery (descriptive analytics), and content management and workflow functionality, enabling workers, supervisors, and directors to collect, retrieve, and view case content.

A commercially available Software-as-a-Service (SaaS) product, Traverse is deployed across the country to revolutionize how social services agencies deliver services by empowering workers to make timely and informed decisions that lead to healthier communities and improved outcomes for foster children. Designed using RESTful architecture, Traverse is capable of incorporating data and content from existing CCWIS solutions, providing any social services agency with immediate value and superior data quality.

Traverse includes a web-based application and companion mobile applications (designed to work in either connected or disconnected mode when workers are performing work remotely or meeting with foster children and foster parents). The web-based application enables workers to collaborate in real time with their supervisors and other workers, quickly making informed decisions that affect the outcomes of their cases. It also enables workers to work closely with foster parents and foster care stakeholders to collect documents, complete and sign electronic forms, and share existing content in a secure manner. The companion mobile applications are optimized to extend the system of engagement into the field when workers are meeting with foster children, foster parents, and foster care stakeholders and automatically sync new data and content back to the web-based application when cellular or Wi-Fi connectivity is available. They also allow workers to access and collect case content while lacking cellular



or Wi-Fi connectivity, which offers significant benefits to remote workers delivering services in rural communities. As a result, the mobile applications increase agency-wide productivity by reducing the need to re-enter data and content and/or return to the office, providing workers with immediate access to critical case information.

The following sections provide additional details around the collaboration, content management, mobility, and case discovery functionalities inherent to Traverse.

## Improving Collaboration – Traverse Connect

When performing casework activities, workers and agency staff need to collaborate closely with foster parents and foster care stakeholders in order to complete and sign forms, collect content, and share existing case information. Often, when workers need to collaborate, it can be a very difficult, manual, and time-consuming process. As more and more work is being performed remotely, agency staff, foster parents, and foster care stakeholders need to be able to communicate quickly and easily to ensure foster children receive timely services.

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*"We've cut down the referral process down to hours instead of days for that to all to get out the door. We've cut the referral process time down by two or three days by going paperless with providers."*

Mae Major, Director of Children & Family Services  
Seneca County, NY Children's Services

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Using Traverse, social services agencies can designate outside foster parents and foster care stakeholders as collaborators in a case, providing them with a limited, permission-based view of a case within Traverse. These collaborators can also access a modified dashboard view of Traverse, containing only case content that the agency worker designates, allowing them to stay up-to-date on the status of a case or any required documentation while maintaining case privacy. Collaborators can view, download, and print the case documentation shared with them, with all actions taken by collaborators being fully auditable.

Workers can also share forms that must be completed by foster parents or foster care stakeholders, including requiring electronic signatures. By allowing workers to collaborate on forms in this manner, social services agencies can reduce the cumbersome task of constantly printing and handing off paper forms or mailing forms and instead empower workers to manage foster care cases more efficiently.

Additionally, collecting case information is often a manual process, requiring a worker's time that they could be spending on other critical work. Foster children, foster parents and foster care stakeholders are often asked to provide the same documentation repeatedly due to worker turnover or if case content doesn't find its way into the appropriate place in the system. This can be traumatic for a child re-telling their story and can cause additional frustration between foster parents, foster care stakeholders, and the assigned worker.

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*"All parts of the process can be completed in Traverse Connect. I can pre-fill forms or send forms to a recipient to fill out and sign in Traverse Connect. I can receive forms back in Traverse Connect and finish the form and it is uploaded straight to the file. The process is more organized."*

Michelle Thackery, Case Aide  
Carver County, MN Health & Human Services

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Using Traverse, authorized foster parents and foster care stakeholders can upload case documentation directly to Traverse, delivering critical content into the hands of workers within seconds. Collaborators can upload

documents to Traverse, which workers can then verify as valid case content or delete if necessary. Once verified and assigned a pre-configured content type, uploaded documents become a part of the case file's formal record, allowing other workers in the agency to access them quickly and easily.

## Engaging with Clients – Traverse Content Management & Mobility

It is critical for workers to easily collect quality data and content for cases, regardless of their location. Without an efficient means of quality data and content collection, workers become inundated with manual, time-consuming processes that limit their time performing necessary work for children in foster care.

Traverse offers social services agencies a unified content and forms management tool for case-related items. Purposefully designed to incorporate data and content from existing CCWIS solutions, Traverse extends content and forms management functionality into a remote work setting or into the field. Using Traverse, case data and content captured away from the office is automatically synced back to the office when a data or Wi-Fi connection becomes available.

Traverse also eliminates the need for duplicate entry by providing workers with an easy and efficient means to collect as much data and content as possible, accessible anywhere in a connected or disconnected state. When in the office or working remotely, agency staff use Traverse to scan and upload high-quality content at its point-of-entry. When in the field, workers use their mobile device to capture content (leveraging the device's camera) via an intuitive user interface. Traverse also offers content and form management functionality that assists with the following:

- Enables workers to send and receive assessments, plans, forms, and referrals from workers within the agency or from foster parents and foster care stakeholders
- Supports collaboration by facilitating information sharing between workers, foster parents, and foster care stakeholders, allowing workers to email content directly from Traverse
- Autofills all known case, client, and service provider demographic data—originating in the existing CCWIS solution—into electronic assessments, plans, and forms, letting workers complete any additional information needed, and allows workers, supervisors, directors, foster parents, and foster care stakeholders to sign content electronically while offline
- Facilitates workers' ability to conduct all manner of assessments, letting them complete these responsibilities as prescribed by the State or in a manner conducive to their work activities (for example, starting an assessment remotely, working through the assessment's sections in a non-linear manner, and finishing the assessment at a later time in a different location)
- Enables workers to complete applicable releases and referrals, incorporate applicable signatures, and send completed plans to respective parties

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*"I can streamline services faster. I can walk out of their house with all the information to do what we were talking about in that moment so I can get stuff rolling. I can get counseling referrals in faster. I can get collateral information and make better decisions for the safety of the kiddos."*

Erika Sebring, Social Caseworker II  
Mesa County, CO Department of Human Services

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- Supports the agency's program administration by providing quality data that can be used when creating ongoing state and federal reports and facilitating continuous quality improvement activities
- Allows workers to electronically route forms and content to supervisors or other staff as necessary facilitating collaboration
- Provides agency a robust workflow solution that can be configured to automate key processes
- Enables workers to take photographs and capture living conditions in full color, record video, and record audio interviews on any mobile device, ensuring every word is captured
- Allows workers to quickly create new versions of forms by leveraging data collected previously to make any necessary edits and finalize a new version
- Allows agencies to report on data and information collected (including form data) to provide key insights for leadership related to children in care

## Enabling More Informed Decisions – Traverse Case Discovery

In the world of social services, workers need to know every foster child's story, inside and out, to ensure the child is safer tomorrow than they are today. However, critical case information about a child (such as root causes associated with allegations, basis for guardianship or foster care, or unique behavioral and medical needs) is hidden or virtually impossible to retrieve. As a result, workers are frequently forced to search through large case files to familiarize themselves with a child's history before even fundamental services can be delivered. In addition, children are often forced to repeat their story to multiple workers or organizations, increasing the trauma associated with re-telling events in order to receive services.

Traverse modernizes this process by leveraging innovative, next-generation technology that provides workers with a more complete picture of a child's past and present to safeguard their future. Using natural language processing, machine learning, and descriptive analytics, Traverse presents workers with the whole story of a particular case or person in an easily digestible, interactive view, empowering workers to become more informed about the following:

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*"What interested us about Traverse is the artificial intelligence feature. When a worker is out in the field investigating and needs to find out what interventions occurred in the past, the worker can have exactly what he or she is looking for in seconds. We can access critical information that can make or break a decision out in the field."*

Julie Mahon, Program Manager, Child & Adult Protective Services  
Yuba County, CA Health & Human Services

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- Prevalent case concepts (such as drugs, risk factors, and protective factors)
- People connected with the child (such as foster parents, guardians, care providers, and resource family individuals)
- A timeline of key events (including transitions, medical events, and legal events)
- Case content, including full-text search, by keyword, type, and/or date range

Traverse also safeguards against confirmation bias, as it assists workers by surfacing authenticated content from case notes, service provider notes, and systems of record. For example, Traverse surfaces risk and safety threats from unstructured content rather than simply using a calculated rating generated by a single individual's input.

To assist workers with visualizing and exploring the content of their cases, Traverse automatically creates an interactive word cloud consisting of prevalent case concepts. When workers click on any of these concepts surfaced in the word cloud, they are able to drill down into extracted concepts, presenting them with all the terms in the source content from which the word cloud was derived. In this way, Traverse empowers workers with knowledge of the critical case concepts and immediate access to the supporting content wherever it is and whenever it was acquired.

Further, workers use Traverse to discover critical connections in a matter of seconds, enabling them to take immediate action. Traverse helps a worker quickly understand a wide variety of information pertaining to their case, including:

- If a child has any positive supports connected to their case.
- If and how frequently a child transitioned (for example, living situations or medical institutions).
- If and how frequently the legal system has been involved with the child.
- If there has been a significant history of mental illness, drug use, or domestic violence.
- If certain services previously helped or failed to help the child or family.
- If other individuals (for example, care providers, doctors, neighbors, or police) are mentioned at any point relative to the child's unique situation.

Traverse accomplishes this by using automated functions to analyze—as a social services worker would—all of a case's collected data, including structured data (such as demographic data), semi-structured data (such as assessments, contact notes, court summaries, and social history), and unstructured data (such as psychological reports, police reports, hospital records, service provider notes, and audio and video files that Traverse transcribes). It shines a light on "dark data" that is otherwise virtually impossible to uncover due to the volume and nature of most case information.

## Specific Questions

The following sections address West Virginia BSS' specific questions as presented in the RFI:

- Ensuring and controlling information access
- Archiving communication and running reports
- Complementing CCWIS
- Current Northwoods customers

### Ensuring and Controlling Information Access

#### RFI Requirement – Page 5

- 3.2.1. How would the web-based communication system ensure that access to utilize the child welfare information technology system is available to only those parties with legal responsibilities to care for and support the foster child? Access must be automated with the existing comprehensive child welfare information system
- 3.2.2. (CCWIS) in order to avoid information being entered into two separate systems.

Traverse supports role-based security access, which allows system administrators to associate permissions with a user through user-based and role-based access controls, ensuring that only workers authorized to view foster care case files are able to access them within Traverse.

Furthermore, Traverse limits access to cases that are considered "restricted or confidential" (i.e., high profile or public figures). User-based permissions ensure that only users that are assigned to a case that is considered "restricted or confidential" can view the case's connected content, as well as those with a designated role.

Role-based permissions (user groups) allow for the creation of security roles that can be configured to match security roles in existing CCWIS solutions. Customers often configure Traverse to mimic the security roles in their CCWIS for controlling access to client data. For example, a user group can be created to allow access to foster care cases, and only users placed into this user group will be able to see data and content associated with foster care cases.

In addition, workers who have access to foster care cases will be able to control any external collaborator access (such as foster parents and foster care stakeholders). Only the collaborators granted permission by the worker will be able to access designated case content, upload files, complete and sign forms, and more.

## Archiving Communication and Running Reports

### RFI Requirement – Page 5

3.2.3. How would the web-based communication system archive communications for the purpose of running reports on responsiveness by parties utilizing the system?

Traverse functions as a content and forms management repository, storing and archiving all case content (including communications with foster parents and foster care stakeholders) within Amazon Web Services (AWS). AWS features state-of-the-art data centers—with redundant and layered controls for security and reliability—which meet cyber security national standards for operation and compliance. AWS tools can also be used to scale resources up and down based on demand and allows a solution to be cost-effective, reliable, flexible, scalable, secure, and perform at a high level.

Traverse includes 11 out-of-the-box reports as well as a dedicated reporting module that offers an additional 30 reports, providing key Traverse insights.

Northwoods is capable of building additional, custom reports within Traverse to meet West Virginia BSS' evolving needs. For example, consent management can be tracked using a custom report. Similarly, Northwoods can build a custom report that pulls all releases of information completed, with the expiration dates of each releases, enabling agencies to be more proactive in making sure all necessary releases are current and maintained.

Using data originating from Traverse, West Virginia BSS can unlock insights—including those found within archived communications with foster parents or foster care stakeholders—to help with compliance and other reporting needs. As a result, West Virginia BSS can:

- Efficiently prepare for compliance reporting and audits
- Quickly pull accurate data for mandated reporting to the State
- Get a data-driven understanding of cases and case information
- Stop manually tracking data in multiple spreadsheets or other systems
- Reduce the burden on workers and supervisors to manually provide data
- Export reporting data for use with other agency reporting tools (such as Microsoft Excel)

## Complementing CCWIS

### RFI Requirement – Page 5

3.2.4. How would the web-based communication system complement the existing CCWIS for the purposes of controlling access to those parties with legal responsibilities to care for and support the foster child and to archive the communications for purposes of discovery or other reasons?

In accordance with CCWIS guidance from ACF, Traverse is compliant with the core requirements to support a CCWIS solution. To comply with modularity guidance from ACF and relevant architecture frameworks including NHSIA and MITA, Traverse ensures a separation of concerns and a reasonable degree of modularity between systems, as evidenced by its compatibility and interoperability with disparate systems. Data can be exchanged with Traverse using a RESTful web services architecture. Both the web and mobile interfaces of Traverse can initiate these web service calls. Additionally, Traverse can achieve interoperability using the same set of services. Great care has been taken to ensure loose coupling and statelessness in the set of exposed services, which is the primary underpinning of the microservices design philosophy.

This approach to interoperability allows us to integrate Traverse with existing CCWIS solutions, including controlling access to case data and content and archiving case communication and documentation. We are experts at integrating social services solutions with systems of record, as evidenced by our West Virginia, California, Colorado, Louisiana, Maryland, Minnesota, Nevada, New York, North Carolina, Ohio, Pennsylvania, and Wisconsin social services implementations. The systems we have integrated with include the following:

- eRAPIDS (West Virginia's integrated, automated benefit eligibility system)
- OSCAR (West Virginia's collection and reporting child support system)
- CalWin (California's welfare administration system)
- CMIPS (California's in-home supportive services system)
- Trails (Colorado's SACWIS)
- CAFÉ (Louisiana's customer portal for SNAP, FITAP, KCSP, Child Support Enforcement Services, and Louisiana Combined Application Project)
- CSES (Maryland's Child Support Enforcement System)
- CARES (Maryland's Client Automated Resources Eligibility System)
- MAXIS (Minnesota's financial assistance and health care system)
- METS (Minnesota's medical assistance system)
- PRISM (Minnesota's child support system)
- SSIS (Minnesota's SACWIS)
- NOMADS (Nevada's Operations of Multi-Automated Data System)
- CONNECTIONS (New York's SACWIS)
- WMS (New York's Welfare Management System)
- ACTS (North Carolina's child support system)
- CAPS (A Pennsylvania child welfare system of record)
- Ohio Benefits (Ohio's healthcare and child care benefits system)



- SACWIS (Ohio’s SACWIS)
- CRIS-E (Ohio’s Client Registry Information System Enhanced)
- SETS (Ohio’s Support Enforcement Tracking System)
- CCIDS (Ohio’s Child Care Information Data System)
- VIBES (Virgin Islands Benefits Eligibility System)
- eWiSACWIS (Wisconsin’s SACWIS)

For these previous integrations, we used the following methods of integration:

- Direct database access
- Application programming interfaces (APIs)
- Comma separated values (CSV) data files

To support technology interoperability and data sharing, Northwoods’ project team facilitates technology discovery sessions with the agency in order to identify the format of data files or integration points. Following discovery, Northwoods develops and provides customers with a Solution Design Document deliverable during project implementation. This document details the design of the complete solution including integration specifics, discusses the steps the agency will need to take to effectively exchange data between systems of record and Traverse, identifies all applicable integration points, presents the agency with a sample of how system data should be exchanged, and explains the process for continuing to exchange system data with Traverse. Northwoods then designs and tests the integration solution in a test environment, verifying that data is sent or received appropriately, prior to deploying the integration solution to the production environment.

As a result, agencies have access to the data and content they need to deliver services to clients and effectively exchange information with foster parents and foster care stakeholders.

## Current Northwoods Customers

### RFI Requirement – Page 5

3.2.5. In what jurisdictions is this software currently being utilized?

Social services agencies throughout the country are currently utilizing Traverse to conduct daily business and deliver critical services to clients. A list of agencies currently utilizing Northwoods solutions is presented in the following table. Please note that counties with an “\*” are currently utilizing Traverse.

West Virginia	
• West Virginia Department of Health and Human Resources Bureau of Child Support Enforcement	• West Virginia Department of Health and Human Resources Bureau of Family Assistance
California	



- Contra Costa County Employment & Human Services Department
- Placer County Health & Human Services Administration\*
- San Mateo County Human Services Agency
- Solano County Health and Social Services Department
- Ventura County Human Services Agency\*
- Yuba County Health and Human Services\*
- Monterey County Department of Social and Employment Services\*
- San Joaquin County Human Services Agency
- Santa Barbara County Department of Social Services
- Tulare County Health and Human Services Agency
- Yolo County Health and Human Services Agency

Colorado

- Douglas County Department of Human Services
- Otero County Department of Social Services\*
- Mesa County Department of Human Services\*
- Weld County Department of Human Services

Louisiana

- Louisiana Department of Children and Family Services

Minnesota

- Aitkin County Health and Human Services
- Beltrami County Health and Human Services
- Carlton County Human Services
- Chisago County Health and Human Services
- Crow Wing County Community Services
- Faribault/Martin County Human Services
- Goodhue County Health and Human Services
- Hubbard County Department of Social Services\*
- Koochiching County Community Services
- Scott County Health and Human Services\*
- St. Louis County Public Health and Human Services
- Anoka County Department of Human Services
- Benton County Health and Human Services
- Carver County Health and Human Services\*
- Cook County Public Health and Human Services
- Dakota County Employment and Economic Assistance
- Fillmore County Social Services
- Houston County Health and Human Services\*
- Itasca County Health and Human Services
- Lake County Health and Human Services Department
- Sherburne County Health and Human Services
- Wright County Human Services

Nevada

- Nevada Division of Welfare and Supportive Services

New York

- Allegany County Department of Social Services\*
- Chautauqua County Department of Social Services\*
- Chenango County Department of Social Services\*
- Jefferson County Department of Social Services\*
- Montgomery County Department of Social Services\*
- Oswego County Department of Social Services\*
- Tioga County Department of Social Services\*
- Cayuga County Department of Social Services\*
- Chemung County Department of Social Services\*
- Erie County Department of Social Services
- Livingston County Department of Social Services \*
- Oneida County Department of Social Services
- Seneca County Department of Human Services\*

North Carolina

- Alamance County Department of Social Services
- Ashe County Department of Social Services\*

- Beaufort County Department of Social Services
- Brunswick County Department of Social Services\*
- Cabarrus County Department of Social Services\*
- Caswell County Department of Social Services
- Cleveland County Department of Social Services\*
- Davie County Department of Social Services
- Guilford County Child Support Enforcement
- Harnett County Department of Social Services\*
- Johnston County Department of Social Services\*
- Macon County Department of Social Services
- Onslow County Department of Social Services\*
- Pitt County Department of Social Services\*
- Rowan County Department of Social Services
- Transylvania County Department of Social Services
- Wake County Child Support Enforcement
- Wayne County Department of Social Services
- Yadkin County Department of Social Services
- Bladen County Department of Social Services\*
- Burke County Department of Social Services
- Carteret County Department of Social Services
- Chatham County Department of Social Services
- Dare County Department of Social Services\*
- Gaston County Department of Social Services\*
- Guilford County Department of Social Services
- Iredell County Department of Social Services
- Lenoir County Department of Social Services\*
- Moore County Department of Social Services
- Orange County Department of Social Services
- Robeson County Department of Social Services\*
- Rutherford County Department of Social Services
- Union County Department of Social Services
- Watauga County Department of Social Services
- Wilson County Department of Social Services\*

## Ohio

- Ohio Bureau of Workers' Compensation
- Ohio Department of Job & Family Services
- Ohio Cosmetology and Barber Board
- Adams County Children Services\*
- Ashtabula County Department of Job & Family Services
- Allen County Children Services\*
- Athens County Department of Job & Family Services
- Belmont County Department of Job & Family Services\*
- Butler County Child Support Enforcement Agency
- Butler County Department of Job & Family Services
- Carroll County Department of Job & Family Services\*
- Clark County Department of Job & Family Services\*
- Clinton County Department of Job & Family Services\*
- Crawford County Department of Job & Family Services\*
- Coshocton County Department of Job & Family Services\*
- Cuyahoga County Employment and Family Services
- Darke County Department of Job & Family Services\*
- Defiance/Paulding Consolidated Job and Family Services\*
- Delaware County Department of Job & Family Services
- Ohio Department of Administrative Services\*
- Ohio Department of Natural Resources
- Adams County Department of Job & Family Services
- Ashtabula County Children Services\*
- Allen County Department of Job & Family Services
- Athens County Children Services\*
- Auglaize County Department of Job & Family Services\*
- Brown County Department of Job & Family Services\*
- Butler County Children Services\*
- Carroll County Child Support Enforcement Agency
- Champaign County Department of Job & Family Services\*
- Clermont County Department of Job & Family Services\*
- Columbus Metropolitan Housing Authority
- Columbiana County Department of Job & Family Services\*
- Cuyahoga County Children & Family Services\*
- Cuyahoga County Office of Child Support Services
- Defiance County Child Support Enforcement Agency
- Delaware County Child Support Enforcement Agency\*
- Erie County Department of Job & Family Services\*

- Fairfield County Department of Job & Family Services\*
- Franklin County Children Services\*
- Fulton County Department of Job & Family Services\*
- Gallia County Department of Job & Family Services
- Greene County Department of Job & Family Services\*
- Hamilton County Department of Job & Family Services\*
- Hardin County Department of Job & Family Services\*
- Harrison County Department of Job & Family Services\*
- Highland County Department of Job & Family Services\*
- Holmes County Department of Job & Family Services\*
- Jackson County Department of Job & Family Services\*
- Knox County Department of Job & Family Services\*
- Lawrence County Department of Job & Family Services\*
- Licking County Department of Job & Family Services\*
- Logan County Children Services\*
- Lorain County Department of Job & Family Services
- Lucas County Department of Job & Family Services
- Mahoning County Department of Job & Family Services
- Marion County Department of Job & Family Services
- Medina County Child Support Enforcement Agency
- Meigs County Department of Job & Family Services\*
- Miami County Children Services\*
- Monroe County Department of Job & Family Services\*
- Montgomery Child Support Enforcement Agency
- Morrow County Department of Job & Family Services\*
- Muskingum County Department of Job & Family Services
- Noble County Department of Job & Family Services\*
- Perry County Children Services\*
- Pickaway County Department of Job & Family Services\*
- Pike County Child Services Board\*
- Preble County Department of Job & Family Services\*
- Richland County Department of Job & Family Services
- Richland County Children Services\*
- Sandusky County Department of Job & Family Services\*
- Scioto County Children Services\*
- Stark County Department of Job & Family Services\*
- South Central County Department of Job & Family Services\*
- Fayette County Department of Job & Family Services\*
- Franklin County Department of Job & Family Services
- Gallia County Children Services\*
- Geauga County Department of Job & Family Services\*
- Guernsey County Department of Job & Family Services\*
- Hancock County Department of Job & Family Services\*
- Hardin County Child Support Enforcement Agency
- Henry County Department of Job & Family Services\*
- Hocking County Department of Job & Family Services\*
- Huron County Department of Job & Family Services\*
- Jefferson County Department of Job & Family Services\*
- Lake County Department of Job & Family Services\*
- Licking County Child Support Enforcement Agency
- Logan County Department of Job & Family Services
- Lorain County Children Services\*
- Lucas County Children Services\*
- Madison County Department of Job & Family Services\*
- Mahoning County Children Services\*
- Marion County Children Services\*
- Medina County Department of Job & Family Services\*
- Mercer County Department of Job & Family Services\*
- Miami County Department of Job & Family Services
- Montgomery County Department of Job & Family Services\*
- Montgomery County Data Processing
- Morgan County Department of Job & Family Services\*
- Muskingum County Children Services\*
- Ottawa County Department of Job & Family Services\*
- Perry County Department of Job & Family Services
- Pike County Department of Job & Family Services
- Portage County Department of Job & Family Services\*
- Putnam County Department of Job & Family Services\*
- Richland County Child Support Enforcement Agency
- Ross County Department of Job & Family Services\*
- Scioto County Department of Job & Family Services
- Shelby County Department of Job & Family Services\*
- Seneca County Department of Job & Family Services\*
- Summit County Child Support Enforcement Agency

- Summit County Children Services\*
- Trumbull County Department of Job & Family Services
- Tuscarawas County Department of Job & Family Services\*
- Union County Department of Job & Family Services\*
- Warren County Child Support Enforcement Agency
- Warren County Data Processing
- Washington County Department of Job & Family Services\*
- Wayne County Department of Job & Family Services
- Williams County Department of Job & Family Services\*
- Wood County Child Support Enforcement Agency
- Summit County Department of Job & Family Services
- Trumbull County Children Services\*
- Tuscarawas County Child Support Enforcement Agency
- Van Wert County Department of Job & Family Services\*
- Warren County Department of Job & Family Services
- Warren County Children Services\*
- Washington County Child Support Enforcement Agency
- Wayne County Public Children Services Agency\*
- Wood County Department of Job & Family Services\*
- Wyandot County Department of Job & Family Services\*

#### Pennsylvania

- Erie County Children and Youth Services\*

#### Virginia

- Northampton County Department of Social Services

#### U.S. Virgin Islands

- U.S. Virgin Islands Department of Finance
- U.S. Virgin Islands Paternity and Child Support Division

#### Wisconsin

- Dane County Department of Human Services
- Milwaukee County Department of Health & Human Services

Our history and experience in providing technology solutions, including web-based communications systems, to state and county agencies is best exemplified within the context of our highly complex and successful implementations. We have successfully implemented and supported our solutions in 13 states—including the State of West Virginia—and one territory, providing us with unique knowledge of West Virginia-specific business processes that will directly transfer to a successful West Virginia BSS Traverse project.

Summaries of our West Virginia, Ohio, and Louisiana implementations are provided throughout the following sections.



## West Virginia Department of Health and Human Resources

West Virginia's Department of Health and Human Resources' (West Virginia DHHR's) Bureau of Child Support Enforcement (BCSE) previously lacked a reliable system for workers to quickly and accurately store, retrieve, and share case documentation and information. In 2009, Northwoods began a statewide implementation of an integrated content and client management system—a solution composed of commercially available software and integrated with Online Support Collection and Reporting (OSCAR), the state's existing child support case management system.

After Northwoods' successful implementation of the system in BCSE, we were tasked with extending the system to other bureaus within DHHR. The first expansion was within West Virginia DHHR's Bureau for Family Assistance (BFA) (formerly the Bureau for Children and Families (BCF), Family Assistance Division), and it focused on point-of-entry capture, sending new documents to workers, task notification, integration with the existing case management system, and context-aware retrieval of images from the State's case management system—known as the e-Recipient Automated Payment and Information Data System (eRAPIDS).

As part of the project, we integrated the solution with various eRAPIDS screens to provide caseworkers with a seamless integration whenever documents are needed along with integration for eRAPIDS task notifications.

The DHHR expansion concluded in August 2016 and was described by the BFA leadership team as one of the agency's most successful technology projects.

---

**Customer**

West Virginia DHHR

**Start and End Date**

November 2009 – August 2016

M&O Ongoing

**Size**

1,800+ staff

**Program Areas**

- BCSE
- BFA

**Solution Scope of Work**

- Integrated Content and Client Management System
- Implementation and Training Services
- Support Services

**Deployment Scope**

Statewide and in each of West Virginia's 55 counties

**Complex Integrations**

- OSCAR
  - eRAPIDS
-

## Ohio Department of Administrative Services

In 2017, the State of Ohio's Department of Administrative Services (Ohio DAS), on behalf of the Ohio Department of Job and Family Services and the Ohio Department of Medicaid, engaged Northwoods to implement an enterprise document management and workflow system (EDMS) across the state's Job and Family Services (JFS) agencies to support their Medicaid, SNAP, and TANF (MST) business processes. Previously, MST caseworkers relied on inefficient, paper-driven processes that frequently led to misplaced documents, an inability to access critical case information, and ineffective client interactions. The state's supervisors also lacked visibility into their staff's daily activities, making it difficult to fully assess agency productivity and progression through the life of a case.

As the result of a competitively awarded RFP process, we began working with Ohio DAS in September 2017 to implement the EDMS solution across the State's 88 JFS agencies. Consisting of commercial off-the-shelf software components (OnBase and Compass software), custom integrations, and professional services and featuring 99.9% availability, the EDMS solution modernized how the State's caseworkers, supervisors, administrators, and directors perform document-driven business processes. Specifically, the solution's software components offered workers the following features:

- **Capture, Retrieve, and Share Documents:** The solution allows workers to capture documents at their point of entry and store them in a central repository for quick-and-easy retrieval. This functionality eliminates the need for copying, physical routing, and the potential for lost or misplaced documents. Moreover, the solution includes customer-facing, self-scan kiosk software that empowers JFS agencies' clients to scan their own documents at their convenience.
- **Create, Complete, and Sign Electronic State and County Forms:** By automating the JFS agencies' processes around completing forms, the solution decreases each agency's dependence on paper-based documentation. The solution transforms state and county forms into electronic templates that can be automatically populated with client information. All electronic form templates are stored within a dedicated forms repository, which reduces the likelihood of versioning-related discrepancies. Leveraging the solution, workers can electronically fill in any client information not autofilled when creating a form.
- **Initiate, Track, and Complete Document-Driven Workflows:** The solution includes an automation engine and electronic routing system (OnBase Workflow) that enables counties to significantly decrease document processing time and increase staff productivity. Capable of notifying workers of tasks that require their attention, the solution assists workers with managing their business functions from start to finish.

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### Customer

Ohio DAS

### Size

21,000+ staff

### Program Areas

- Medicaid/SNAP/TANF
- Child Welfare
- Child Support
- Child Care

### Solution Components

- EDMS
- Traverse (Child Welfare only)
- Implementation and Training Services
- Support Services

### Deployment Scope

Statewide and in each of Ohio's 88 counties

### Complex Integrations

- SACWIS
  - Ohio Benefits
  - Client Registry Information System Enhanced (CRIS-E)
  - Support Enforcement Tracking System (SETS)
  - Child Care Information Data System (CCIDS)
  - Interactive Voice Response System (IVR)
  - InnovateOhio
-

- **Support Counties with a Centralized Document and Forms Repository:** A centralized document and forms repository allows workers to easily search for and retrieve both documents and forms saved in the EDMS, which in turn facilitates collaboration and sharing across an agency.

Northwoods fully implemented the EDMS solution statewide by August 2018 on time, within budget, and less than 12 months following contract execution.

Because state stakeholders recognized the project as one of the most impactful technology projects in Ohio DAS' recent history, the State of Ohio exercised contractual options to extend the EDMS solution to Child Welfare, Child Care, and Child Support program areas and add additional solution components.

The additional Child Welfare solution components (simply referred to by Ohio DAS as the Child Welfare EDMS) featured Traverse and completely revolutionized how JFS and Children Services workers approach their jobs. Prior to Northwoods implementing Traverse, child welfare caseworkers commonly struggled with the following:

- Effectively collecting investigation-driven interview documents and collateral evidence—content necessary to support an accurate finding of abuse, neglect, or deprivation—while in the field.
- Efficiently managing case content while causing the least amount of adverse disruption to a child's life, well-being, and self-worth.
- Completing assessments, plans, and forms in a timely, error-free manner regardless of the worker's location.
- Sharing case content across the agency, other counties, and the state.
- Completing activity logs while in the field and manually entering them into SACWIS.
- Acclimating other workers to a case, which includes events, people, and associated content contained within 3,000 to 5,000 pages of information.
- Uncovering supports buried in a child's case history to ensure the right people remain involved in the child's life.
- Discovering critical case information buried deep within a paper or electronic case file.
- Analyzing an overabundance of case information in an efficient and effective manner to enable workers to better recognize a case's risk factors, permanency barriers, and wellbeing gaps.
- Creating accurate case timelines to support county-, state-, and court-related mandates.

Traverse empowered the State of Ohio's child welfare caseworkers to overcome each of the above-listed issues. Integrated with the state's SACWIS and implemented using Northwoods' agile coaching methodology, Traverse automated agency business processes and positively impacted how child welfare caseworkers interact with children, youth, and families.

Northwoods completed the implementation of the Child Welfare EDMS in December 2018, only 7 months after DAS elected to expand the original EDMS solution.

Today, Ohio child welfare caseworkers bring Traverse with them into the field to effortlessly collect case content and create case documentation. They use Traverse to easily collaborate with their peers and contracted service providers. They leverage Traverse to gain new insights into their cases and achieve a holistic view of each child's past and present. Traverse has revolutionized the delivery of child welfare services across the State of Ohio.



## Louisiana Department of Children and Family Services

Louisiana Department of Children and Family Services (Louisiana DCFS) previously relied heavily on labor-intensive, paper-based processes, which led to lost documents, an inability to access necessary information, and inefficient communications with clients. The agency lacked visibility into workers' daily work, making it difficult to fully assess their productivity. In addition, Louisiana DCFS had quality assurance concerns pertaining to documentation for compliance, and it lacked a system to effectively route documents to agency staff so they could quickly process benefit applications.

In 2011, Louisiana DCFS began working with ACS/Xerox (now Conduent) and Northwoods on a statewide project to implement an integrated electronic content management (ECM) solution across multiple program areas for 129 distinct sites throughout Louisiana's 64 parishes. The project was intended to improve customer service, facilitate more efficient business processes for document workflows, and increase overall worker productivity.

ACS/Xerox partnered with Northwoods primarily because of our expertise in providing social services solution implementations and the significant business process reengineering that Louisiana DCFS required. For the project, Northwoods provided project management oversight from the discovery process through deployment of the statewide ECM solution, provided customized training for Louisiana DCFS workers, and designed document workflows. In addition, Northwoods facilitated the integration between the ECM solution and the State's Common Access Front End (CAFÉ) portal. CAFÉ allows clients to easily access and update documents, renew benefits, and check the status of an application. Northwoods designed the business process and integration to ensure that documents entered through CAFÉ are automatically routed to the correct worker.

Northwoods' work with ACS/Xerox was highly successful, giving over 4,000 workers across the state immediate access to electronic documents that were captured and indexed by the worker or client. This integrated ECM solution has markedly improved customer service by allowing clients to apply for benefits in person, by mail, by using the CAFÉ customer portal, or by calling a customer service center. The project improved worker productivity through automated workflow and increased client self-service. In turn, increased opportunities for self-service empowered clients to provide timely documentation and remotely monitor their cases throughout the approval process.

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**Customer**

Louisiana DCFS

**Size**

4,000+ staff

**Program Areas**

Child Welfare

**Solution Components**

- ECM
- Implementation and Training Services
- Support Services

**Deployment Scope**

Statewide and in each of Louisiana's 64 parishes

**Complex Integrations**

- CAFÉ
  - Document Processing Center
-



## Documents Being Sought

### RFI Requirement – Page 5

3.3.1. Training materials, preferably viewable online.

Traverse offers a dedicated, in-app resource center that contains help articles, training videos, live chat support, and more. Northwoods can provide West Virginia BSS with access to this pre-existing Traverse training content upon execution of a non-disclosure agreement.

Conversely, Northwoods is happy to provide West Virginia BSS with a live demonstration of Traverse, which can include a presentation of the Traverse resource center.



## Appendix A: Traverse Functionality

Traverse offers social services agencies a commercially available, web-based, Software-as-a-Service (SaaS) product that supports casework regardless of a worker's location. It offers a unified user interface (UI) that enables agency staff to manage, create, and access case content and information from web browsers and native mobile applications.

Details around Traverse functionality and technical specifications are provided in the following sections.

### Traverse Functionality: Connect

The portal functionality in Traverse enables agency staff to invite clients and service providers (collectively referred to in this section as collaborators) to view shared case content from within Traverse, eliminating the need to download, email, and individually track content outside of the application; share electronic forms for signature, and allow collaborators to upload content.

The Traverse Connect functionality includes the following:

- Allows agency staff to invite an unlimited number of collaborators to electronically interact with identified content of a case file through a secure, auditable account
- Allows agency staff to easily share case content with authorized collaborators
- Provides authorized collaborators with the ability to view case content from directly within Traverse from any device (computer, tablet, phones)
- Enables authorized collaborators to receive and electronically sign forms within Traverse
- Locks form fields that agency staff has edited by default, so authorized collaborators cannot overwrite any data in those fields
- Enables authorized collaborators to directly upload content into Traverse and notifies assigned agency staff when content is uploaded
- Allows agency staff to verify uploaded content before it is permanently added to the case file
- Provides agency staff with the ability to administer authorized collaborators within Traverse (for example, staff can easily remove a collaborator who is no longer associated with a specific case file)

### Traverse Functionality: EDMS

Traverse offers an electronic document management system (EDMS) in which agencies can manage their case files, content, and staff. Case files are populated into the system with or without a separate system of record, and agency staff use that framework to track the clients, service providers, and related content in each case.

Traverse electronically captures case content, allowing agency staff to scan case content at its point-of-entry and eliminating copying, physical routing, and the potential for lost and/or misplaced content. It extends content

management functionality into the field and automatically syncs new content back to the office when cellular or Wi-Fi connectivity becomes available. To better understand the amount of content and information in the system, Traverse displays a real-time view of workers' caseloads and provides visibility into the work at an agency.

The Traverse EDMS functionality includes the following:

- Allows agency staff to connect scanned, uploaded, and created content with a case, client, and/or service provider
- Allows agency staff to preview a document and add or remove pages when scanning before submitting it to the hosted repository
- Automatically scans in color or black and white based on the document
- Automatically applies simplex or duplex capture settings based on the document
- Allows agency staff to upload electronic content
- Allows agency staff to add comments to content items
- Provides the entire agency with immediate and simultaneous access to case content while in either connected or disconnected modes
- Allows agency staff to capture and create case and client content (such as photos, documents, audio, and video) on a tablet while in either connected or disconnected mode
- Allows agency staff to quickly take photos and add captions on a phone or tablet
- Automatically captions case content (for example, images, audio, and video) with a staff member's or service provider's ID and a date stamp while in either connected or disconnected mode
- Allows agency staff to add an optional caption to a captured photo or content item while in either connected or disconnected mode
- Uses a uniquely defined child and adult social services content classification scheme (commonly referred to as "taxonomy") to classify and organize electronic case content
- Allows agency staff to add, edit, or remove connected cases, clients, and service providers and modify content types while in either connected or disconnected mode
- Automatically connects scanned and uploaded content to the client, case, and/or service provider based on the context the worker has started with, making it easily accessible by the entire agency
- Allows agency staff to print documents from Traverse
- Allows agency staff to download an entire case file with one click
- Provides the option to only synchronize content between the web application and companion mobile applications at the case level
- Allows agency staff to perform a text search across all content they can access
- Allows agency staff to filter case content by content type or create date
- Provides agency staff with indicators when other workers add content to their cases on the web and mobile applications
- Allows supervisors to access cases without being assigned to them

- Allows supervisors to view the staff lists of their coworkers to audit access
- Provides supervisors with a searchable list of workers and their cases, which they can use to navigate to individual cases for more information or see forms and documents that their workers have open
- Enables users assigned to specific service deliveries to access its restricted case files
- Enables users, specifically clerical workers, assigned to specific service deliveries to access a limited view of restricted case files
- Allows agency staff to route forms, scans, and uploads to themselves or other staff members
- Allows agency staff to view forms, scans, and uploads routed to them in a personal workspace
- Allows supervisors to view other users' workspaces and reassign items if needed
- Keeps an audit trail of where forms, scans, and uploads have been routed and how they've been managed over time

## Traverse Functionality: Forms

Traverse allows agency staff to collect data, including electronic assessments, plans, and forms, on their desktops and tablets. It extends forms functionality into the field and automatically syncs new content back to the office when cellular or Wi-Fi connectivity becomes available.

The Traverse forms functionality includes the following:

- Allows agency staff in the field to complete, sign, process, and share assessments, plans, and forms while in either connected or disconnected mode
- Automatically connects data and electronic assessments, plans, and forms to the client, case, and/or service provider based on the context the worker has started with, making it easily accessible by all workers, supervisors, and directors while in either connected or disconnected mode
- Provides the ability to write short-hand or comprehensive case notes that are automatically tagged with the case, worker, and date/time while in either connected or disconnected mode
- Allows agency staff to autofill demographic data from a case, client, and service provider index directory while in either connected or disconnected mode, avoiding the need to re-enter data
- Allows agency staff, service providers, and clients to apply electronic signatures to an assessment, plan, and form while in either connected or disconnected mode
- Allows agency staff to share assessments, plans, and forms with one or more colleagues and indicate if they need to review, sign, etc.
- Allows agency staff to easily access and edit their colleagues' in-progress assessments, plans, and forms
- Allows supervisors to reassign caseworkers or hand off assessments, plans, and forms as needed
- Allows agency staff to establish renditions of commonly used assessments, plans, and forms that require frequent updates
- Stores completed electronic assessments, plans, and forms as both finalized PDF electronic content and as specific data elements within the hosted repository

- Allows agency staff to store in-progress assessments, plans, and forms, which can be completed later
- Allows agency staff to preview and print in-progress assessments, plans, and forms
- Provides the ability for agencies to create regional and state assessments, plans, and forms
- Provides various types of fields, such as checkboxes, multi-line text fields, signatures, etc.
- Automatically locks assessments, plans, and forms once signature(s) are applied
- Offers exact match functionality, ensuring electronic assessments, plans, and forms appear identical to the agency's or provider's original assessments, plans, and forms
- Sends notifications to anyone mentioned in an assessment, plan, or form

## Traverse Functionality: Case Discovery

The case discovery functionality in Traverse provides agency staff with a clear, easy to understand view of a case that evolves in real time as additional content is added.

The Traverse case discovery functionality includes the following:

- Presents agency staff with an evolving, real-time view of the case
- Provides a plain-text version of documents, audio, and video files
- Automatically extracts people mentioned in case content
- Automatically extracts relationships of people mentioned in case content
- Automatically extracts events from case content
- Automatically processes and extracts incoming content and maps it to concepts (for example, risk factors), which align with CFSRs

## Traverse Functionality: Capture

Traverse Capture, available on iPhones or Android phones, allows agency staff to quickly add photos to a case from their phone.

Traverse Capture includes the following functionality:

- Allows agency staff to capture photos on a phone while in either connected or disconnected mode
- Allows agency staff to connect photos with a case, client, and/or service provider
- Allows agency staff to preview a series of photos and add or remove photos before submitting it to the hosted repository
- Automatically captions case photos with a staff member's or service provider's ID and a time/date stamp while in either connected or disconnected mode
- Allows agency staff to add an optional caption to a photo while in connected/disconnected mode

- Uses a uniquely defined child and adult social services content classification scheme (commonly referred to as “taxonomy”) to classify and organize electronic case content

## Traverse Functionality: Workflow

The Traverse Workflow functionality supports caseworkers and supervisors by automating content-driven business processes within Traverse.

- Allows agencies to configure workflows
- Allows agencies to assign users to specific workflows
- Allows agencies to set default due dates based on content type
- Allows agencies to set a default comment based on content type
- Allow agencies to set a default recipient or workflow based on content type
- Allows content items to be routed to a workflow that many workers have access can pull from, this can be used for “case banking”
- Allow workers to see all work items in their workspace and in workflows in one view
- Allows supervisors to see all work items in each workflow and for each user
- Allows workers to filter work items by status, priority, connection, who assigned it, and the work item type
- Allows users to reassign work items

## Traverse Functionality: Reports

The Traverse Reports module enables agencies to unlock data stored in Traverse—including data entered on local and state forms—to help with compliance and other reporting needs. As a result, no manual effort or separate spreadsheets are required to gain key insights around clients, cases, and staff.

The Traverse Reports functionality includes the following:

- Allows agencies to efficiently prepare for compliance reporting and audits
- Enables supervisors and/or directors to quickly pull accurate data from Traverse to support mandated reporting
- Provides data-driven insights into cases and case information
- All report data can be exported to excel
- Agencies have the ability to work with Northwoods to build custom reports

## Traverse Technical Specifications

Traverse technical specifications are as follows:

- Provides a highly available SaaS solution
- Leverages an Amazon Web Services (AWS) repository hosted in the U.S. to securely store case content
- Uses role-based security to protect sensitive case content from unauthorized users
- Applies AES-256 encryption to encrypt data at rest
- Applies TLS 1.2 encryption to secure all data in transit
- Provides agency staff and service providers with a privacy mode in the mobile application that limits what is viewable within a single case, ensuring no other client information can be viewed
- Protects client-, case-, and service provider-related data stored on a tablet with industry-standard application encryption
- Enables agencies to leverage multi-factor authentication through single sign-on (SSO) integration
- Features a highly available solution
- Features a 99.9% system uptime with maintenance occurring outside of peak service hours
- Runs on hardware and software found in the [3rd party compatibility document](#)
- Requires user authentication
- Uses only HIPAA-compliant services
- Uses only FedRAMP-compliant services
- Adheres to industry best practices and SSAE-18 standards
- Supports ETL integrations with case management systems to facilitate autofill functionality





## Appendix B: RFI Acknowledgment

The final, signed page of the original RFI document is presented on the following page.

# Request for Information CRFI BSS230000001

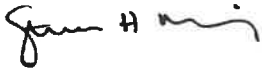
## West Virginia Department of Health and Human Resources

**4.2.4. Responses:** All responses must be submitted to the Purchasing Division **prior** to the date and time stipulated in the RFI as the opening date. All submissions must be in accordance with the provisions listed in Section 2: Instructions to Vendors Submitting Information.

**4.2.5. Response Delivery:** Vendor's response must be delivered by the opening date of 04/11/2023 at 1:30 PM ET to the West Virginia Purchasing Division at:

2019 Washington Street, East  
Charleston, WV 25305

By signing below, I certify that I have reviewed this Request for Information in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this information for review and consideration;



Northwoods Consulting Partners, Inc.

(Company)

Steve Koenig, Business Development Manager

(Representative Name, Title)

Phone: 740-215-0141, Fax: 614-889-4832

(Contact Phone/Fax Number)

4/11/23

(Date)