Ohio | Department of Children & Youth

Deployment Communication
EDMS – Traverse/OnBase
Child Welfare Historical Documents Coming Soon

Who will this impact?
Public Children Services Agencies

What problem are we trying to solve?
County agencies across the State of Ohio still maintain historical child welfare documents within a variety of legacy document management systems. The goal of the Electronic Document Management Solution (EDMS) is to offer county workers an easy manner to access electronic case files, inclusive of their complete case history. To accomplish this objective, historical child welfare documents can be migrated into Child Welfare EDMS' Traverse or OnBase component.

During the initial rollout of Child Welfare EDMS, many counties elected to proactively store child welfare content electronically within the Child Welfare EDMS' OnBase component (content which included historical case documents). For these counties, an existing integration was used to bring those documents into the State OnBase system and then ultimately Traverse. During the move of documents into Traverse, some documents were unable to be associated with a case, person, or provider because of them being pre-Ohio SACWIS; therefore, those documents remained in OnBase as "orphaned" documents. Since Traverse requires documents to be associated to a case, person, and/or provider, these "orphaned" documents were unable to be moved to Traverse without additional effort. Because of the documents not being in Traverse, workers are required to log into OnBase to retrieve any historical documents, which is a critical step if that family has a subsequent case opened.

What can you expect?
The OnBase Solution: If counties wish to use the OnBase solution for pre-Ohio SACWIS case, person, or provider documents, those responsible for scanning case content can upload content into OnBase via Compass Capture. OnBase does have a different interface and document taxonomy than what is used in Traverse. In addition, if the same user wants to scan content into both Traverse and OnBase (via Compass Capture), the appropriate scanner driver must be uninstalled and reinstalled each time they transition between applications. This is available at no additional cost to counties.

The Traverse Solution: If counties wish to use the Traverse solution for pre-Ohio SACWIS case, person, or provider documents, the county agency can work with Northwoods Consulting Partners, Inc. (Northwoods), the vendor engaged with the EDMS, to import historical documentation (scanned or electronically migrated) into the Child Welfare EDMS Traverse component.

If the county possesses paper case files, Northwoods can work with the county to have them complete a file with minimum demographic details. This will enable Northwoods to systematically create cases and persons within the Child Welfare EDMS Traverse component so that when the county goes to scan their paper case files, they have a place for the documents to be easily stored and retrieved.

If the county has historical electronic cases in a local system or wishes to engage a dedicated backfile scanning partner, Northwoods can work with the county to ensure appropriate metadata is

associated with the electronic documents (which will facilitate the creation of case(s), and provider(s), and necessary as part of the import process). Once historical case(s) and providers(s) are created, Traverse will no longer be a one-to-one match with Ohio SACWIS.

Northwoods will create a new Traverse service delivery called "Historical" to assign all of these case to. The State will work with counties to assign the appropriate users to the new "Historical" service delivery. Northwoods will create a naming convention for cases and providers:

        Case name: Historical
        Primary Case ID: H_county code_pre-SACWIS case number
        Organization (Provider) name: Historical
        Organization ID: H_codename_pre-SACWIS org ID.

By having all child welfare documents stored within the Child Welfare EDMS Traverse component, child welfare workers can use a single application to interact with all existing document management content, regardless of how old the documents may be. All historical case content stored within the Child Welfare EDMS Traverse component will be indexed using the agreed upon, State-approved child welfare taxonomy.

As this will be an additional effort, the county and Northwoods would have to enter into an agreement and determine cost of the above solution.

How can you prepare?
If your county is struggling with the situation above, you can take advantage of one of these solutions. Please reach out to DCY or the EDMS Helpdesk with further questions.

If you have additional questions pertaining to this Deployment Communication, please visit the Customer Care Center for assistance.