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ENHANCING TRANSPARENCY AND AGILITY IN SOCIAL WORK SERVICES VIA THE SWAN PLATFORM

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ABSTRACT

Social Work Services (SWS) play a vital role to address intricate social, economic, and emotional challenges. But traditional mechanisms are failing because of inefficiencies in the form of lengthy paperwork, process lag, non-transparency, and stakeholder communication failures. Social Worker Administration Network (SWAN) app, using Salesforce and digital, seeks to transform and accelerate SWS case handling by incorporating features such as automated workflows, electronic signatures, instant notification, mobile access, and built-in analytics. SWAN reduced case processing time from a whopping 22 days to a mere 4 days and has given reporters and partners end-to-end visibility. This essay analyzes the strengths and weaknesses of traditional SWS services, recognizes the issues that are faced, and illustrates how the application of SWAN solves these issues to build an elastic, open, and customer-centric social service system. The application of SWAN is a critical first step to leverage technology in order to enable social workers and maximize the effects of the individuals being served. It shortens case processing time, enhances referral accuracy and transparency, has mobile access, automatic reminders, e-signing for documents, and analytics integration.

By breaking these barriers, SWS hopes to enhance the quality of service delivery and enhance the life of its clients.

Keywords: Social work services (SWS), Social Inclusion, Empowerment, SWAN, Salesforce Platform

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1. Introduction

The Social Work Services (SWS) system is established with the aim of offering social welfare and protection services to vulnerable individuals, families, and communities. Its basic goals are to assist vulnerable groups, achieve social integration, and protect the rights of vulnerable people vulnerable to social exclusion. SWS systems function through government departments, not-for-profits, local governments, and other partners to offer integrated, person-centered care. The Social Welfare System (SWS) is focused on providing maximum support to clients by coordinating different social protection interventions including housing, health, education, and labor market support. It is managed through social workers and maintained up-to-date records. Multidisciplinary care is employed for optimizing the quality of care. Contemporary SWS systems use web-based systems for communication, record maintenance, and case management. Community involvement is promoted through initiatives like "Neighbourhood Social Worker." Access at all times is assured by national hotlines or call centers. Continuing education is provided to managers and employees in strategic planning, problem-solving, leadership, and service delivery [1].

It is faced with various challenges, including administrative complexity, complicated case management systems, resource constraints, role confusion, lack of information, emotional pressure, bureaucratic obstacles, and data protection. Social workers at times experience burnout, and this can reduce client time. Inefficient user training, difficult IT systems, and technological problems can slow down workflow and productivity. Lack of resources also slows down service delivery through poor infrastructure, staff, and finances. Excessive caseloads and non-typed occupations may cause stress and lower the quality of care. Manual processes or detached channels can cause communication lags, leading to miscommunication

and loss of data. Administrative obstacles can slow down the supply of services and frustrate clients and workers [2].

It seeks to improve the delivery of social welfare services by streamlining different social protection interventions, including accommodation, health, education, and employment services. Streamlining eliminates duplication and puts all that clients require within reach. Social workers can handle cases and keep records in an electronic record-keeping system with improved accuracy and less paperwork. It enables multidisciplinary work, including professionals such as psychologists, legal professionals, and doctors, to provide total attention to clients' needs. Implementation of technology on SWS platforms makes report writing, communication, and case management automated, lessening administrative work and minimizing errors. Neighborhood outreach and local organizations' partnerships ensure that assistance is culturally sensitive to local practices. Hotlines and websites provide reporting and support 24/7, allowing social workers to act promptly on emergency cases. Best-practice standards and online training modules make education and training continuous, allowing social workers to stay current with new regulations, resources, and intervention techniques.

Generally, the SWS system is designed to enhance the delivery of social welfare aid and facilitate support for social workers. Social workers are facilitated by paperless procedures, electronic files, and centralization of data to enhance efficiency, accuracy, collaboration, and emergency response. They help minimize paperwork, maintain up-to-date customer information, and generate multidisciplinary intelligence to enhance client outcomes. Round-the-clock mechanisms and public participation technologies make social workers capable of reaching out to marginalized groups and responding to emergencies in a timely manner. Access to continuing education allows social workers to update their skills continuously and deal effectively with new challenges. The system seeks to ensure greater personalization and accessibility of social services through diverse means.

It is an integrated platform service delivery mechanism that automates processes and enhances public-government interaction. Locally based case managers who are assigned to each of the beneficiaries develop individualized plans for him or her, ranging from job placement, business establishment, and capacity development through different programs. The system interlinks different social protection programs like health, nutrition, education, and employment into one integrated package of assistance. National hotlines and contact centers provide prompt information and support [3]. Projects such as the "Neighbourhood Social Worker" encourage partnership between local government departments and civil society players to provide individualized, culture-sensitive support at the local level. The SWS employs integrated

computer and management information systems that hold one single, current database of beneficiaries. This facilitates monitoring, coordination, and tailoring of services on the basis of precise, current data. Finally, the SWS enables subnational institutions by tailoring services to particular places' needs and contexts, ensuring greater accessibility and tailoring [1]. The SWS case management system is a challenge to social workers that results in poor usability, system downtime, inefficiency, and loss of work.

The social workers are generally confronted with issues on a daily or weekly basis, including poor training, navigation issues, and sluggish access to information. The issues cause dissatisfaction at the workplace and would lead the employees to resort to paper-based practices. Inefficiency and time and work wastage and ineffective utilization of time and work also occur where social workers misplace case notes or assessment, threatening their practice standards and direct client work time and intervention planning. Slow and cumbersome software coupled with increasing caseloads cause work overloads with resultant burnout and stress. Communication and coordination problems will occur if the system is not easy to use, which will lead to delays in approvals, signatures, and delivery of service and complicate case management. The challenges that come with unreliability and inaccessibility of case management systems have the potential to lead to reduced job satisfaction, emotional exhaustion, and turnover. Therefore it is most imperative for the social workers to embrace an effective and easy-to-use solution to enhance their overall health and performance [4]. The Social Work Services (SWS) system launched in 2024 will enhance the referral mechanism of the needy for social services to the Department of Social Services (DSS).

The new system did not only expect to disassemble paper-based processes, but also to enhance reactivity, avoid delays, decrease social workers' workload, enhance coordination and communication, enhance data security and accuracy, and serve the local community. The previous system was at risk of misinformation and errors since it was heavily dependent on manual documentation processing. Computerization of the referral process was to offer precise, complete, and available instantly information, minimizing the necessity for handwritten referrals. The new software also streamlines workflows and quicker processing, minimizing waiting times and offering prompt support to vulnerable populations. The new system further minimizes the workload of social workers by automating documentation and case management, enabling them to devote time to direct client contact and service. Electronic approvals, immediate updates, and better collaboration eliminate barriers and improve workflow efficiency.

Computer files also make data protection rules and data integrity possible with the availability of a secure, centralized environment for handling sensitive customer information. The software also promotes reporting and referral of individuals who need social services, which makes identification and service provision to vulnerable groups easier and more efficient. The 2024 application is intended to enhance accuracy in the referral process by automating processes and data entry to eliminate human error. It comes with a centralized dashboard for monitoring referrals in real-time to offer up-to-date information and eliminate misunderstanding.

The application has automated update and verification mechanisms for ensuring information is kept current on customers and service providers. It may be compatible with existing DSS databases and communication infrastructure, minimizing administrative work and eliminating duplicate information. The user-friendly interface minimizes the likelihood of incomplete and incorrect submissions to allow social workers and the public to submit and track referrals without the need for elaborate training. Computerized reminders and notifications for timely gap-filling and accuracy of referrals are also facilitated. The application also guarantees strict security measures to maintain privacy and legislative adherence, with data integrity and confidence. Generally, the 2024 application is geared towards simplifying the referral process for the Department of Social Services [5].

2. Methodology

The Social Worker Administration Network (SWAN) application, developed on the Salesforce platform, addresses inefficiencies and delays under the former manual, paper-based Social Work Services (SWS) system. It streamlines social service referrals and case management to more facilitate accessibility, speed, and transparency. SWAN features are Social Work Case Flow Management, Electronic Document Signing Online, Real-Time Notification, Conservatorship of Estate Management, Analytics and Reporting, Printing Checks, Mobile Access, and Document Management through BOX. They allow easy processing, secure electronic signatures, real-time notification, estate conservatorship cases with custom modules, data-driven decision-making, and mobile access for flexibility and responsiveness. The solution also enables data-driven choices with integration with Tableau for effortless disbursal of social services in real-time. BOX integration with Salesforce provides

enhanced document security and shareability, offering an improved, more efficient, and clearer system.

SWAN online portal has minimized processing time significantly by streamlining steps that previously took up to 22 days manually in a mere four days. It offers transparency to statutory reporters and partners to allow them to track referrals and get information at each stage of the life cycle of a case. SWAN works 24/7 to process service requests and report issues on demand. It also allows greater flexibility and customer-focused service through automating procedures and facilitating more communication. Its reliability, punctuality, and transparency are especially crucial in issues that decide life or death, further enhancing public trust in social services.

The transition from paper-based to web portals in social work case management has cut processing time enormously, enhanced data accuracy and access, and improved communication and transparency. Web portals enable social workers to view complete client information at any time, minimizing errors and loss of data due to handwriting. They also give real-time notifications and updates, which result in greater collaboration and trust. Round-the-clock access and flexibility come from cloud-based platforms and mobile access, enabling social workers and clients to report issues, refer cases, and access services whenever they want. Online document signing, workflow automation, and digital management of documents free social workers from administrative tasks so that they can spend more time on client interaction face-to-face [6].

Electronic platforms facilitate safe sharing of data across collaborating organizations and interdisciplinary teams, promoting harmonized and holistic care. Data-driven decision making is facilitated through integration with analytics platforms like Tableau, making reporting, outcome measurement, and identification of service gaps possible. Electronic systems also support telehealth, video conversations, and texting, which overcome social and geospatial distances and enhance accessibility for vulnerable or rural populations [7].

The multi-level structure of the Social Worker Administration Network (SWAN) segregates the network logically into different levels or tiers based on specific functions and connected in a hierarchical manner for efficient, scalable, and reliable connectivity. The multi-level architecture facilitates scalability and reliability in the following ways [8]:

- **Vertical Connectivity:** State Headquarters (SHQ) at the topmost level, District Headquarters (DHQ), followed by Block Headquarters (BHQ).

- **Horizontal Connectivity:** Government offices and departments are horizontally connected to their respective Points of Presence (PoPs).
- **Scalable Distribution:** Tiered distribution provides scalability, enabling each level to scale independently without affecting other tiers' workload.
- **Vertical Scalability:** Processing capacity and bandwidth can be added at different levels to handle increased loads.
- **Load Balancing and Traffic Control:** Multi-tier architecture allows load balancing at each level, making optimal use of resources and avoiding bottlenecks.
- **Fault Isolation and Reliability:** The network becomes more reliable as the network is segmented into tiers.
- **Security and Access Control:** Multi-tier architecture supports layered security with better security controls at higher tiers.
- **Technology Flexibility:** Various technologies may be used at respective tiers or sites based on geography and infrastructure availability.

It is a multi-level architecture that segments the network into separate levels or tiers, each with specific functions. This hierarchical design facilitates effective data management and flow between administrative levels. Horizontal connectivity allows sharing of resources and interdepartmental communication among different government departments and offices. This architecture also facilitates tiered distribution for scalability, where every tier is grown independently without affecting the workload of other tiers. Vertical scalability facilitates increasing resources like processing power and bandwidth at multiple levels [9].

Load balancing and traffic control are facilitated by multi-tier architectures also through distributing the incoming requests on the network nodes or servers evenly, ensuring maximum utilization of the resources without creating bottlenecks. High-capacity connections are maintained constantly for fast data transfer between the levels in the form of, say, fiber-optic connections. System-level reliability is ensured with partitioning the network into layers so that failure or faults in one layer will not be propagated to others. Redundant links and failover at every layer provide connectivity reliability. Layered architecture allows access control and security, with every layer providing perimeter defenses and access controls to inhibit intruders. Improved-secured top layers with tighter security policies can partition sensitive information and vital services. Last but not least, the SWAN provides technology deployment flexibility, which will guarantee connectivity in rural and urban areas as indicated in Figure 1 [9]:

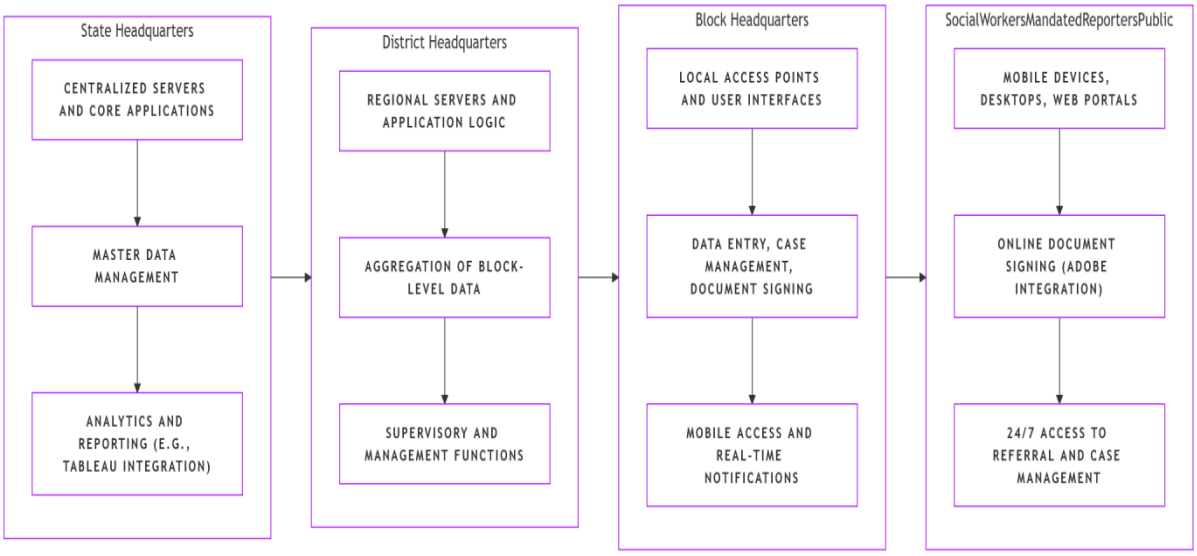

Figure 1: Multi-tier Architecture of SWAN (Social Worker Administration Network)

It entails a systematic process of collecting requirements, involving stakeholders, carrying out contextual analysis and feasibility study, establishing goals and success criteria, and developing value-for-money (VfM) standards. This entails requirements gathering, involving stakeholders, analyzing existing systems, infrastructure, and human resources, and identifying target versus current capability gaps. Gaps analysis and process mapping comprise capturing current case management procedures and making a map of future work processes and determining differences between target expectations and existing capabilities. Capabilities and resource evaluation comprise the examination of existing staffing, training, and technical infrastructure, establishing budgetary limitations and sources of finance, and planning change management and capacity building.

Planning for implementation entails developing an in-depth project plan detailing decision-making processes, governance structures, and plans for mitigating risks. The final step entails seeking approvals from regulatory bodies, financing institutions, and management and setting aside funds for subsequent stages. This systematic process ensures goal alignment, stakeholder requirements, and readiness with resources. The rollout of the Salesforce-based Social Worker Administration Network (SWAN) must be a structured, phased process to guarantee stability, usability, and congruence with social service objectives. A recommended approach to Salesforce implementation and digital transformation is presented grounded in best practices is shown in below Figure 2:

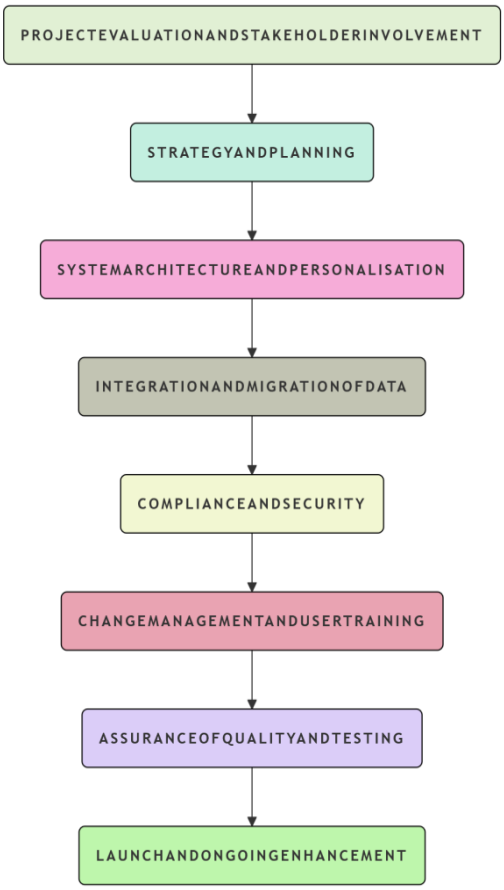

Figure 2: Strategy for Salesforce Implementation and Digital Transformation

1. **Project Evaluation and Stakeholder Participation:**
    - Set specific objectives for SWAN, such as improving processing times, making data more transparent, and improving referral accuracy.
    - Involve stakeholders to gather requirements and build buy-in.
    - Document existing processes and map systemic problems to address.
2. **Strategy and Planning:**
    - Organise a team with separate responsibilities.
    - Develop an implementation road map with milestones for testing, integration, configuration, and rollout.
    - Perform a risk assessment in order to determine possible risks.
3. **System Architecture and Personalisation:**
    - Translate business specifications into technical specifications.
    - Set up workflows, dashboards, and user roles with Salesforce's out-of-the-box features.

- Tailor modules for cheque printing, estate administration, and document management connectors.
- Create user interface for simplicity and ease of use.

4. **Data Integration and Migration:**
    - Data Preparation and Cleaning: Properly cleansed and deduplicated historical data.
    - Migration Execution: Used SQL, SOQL, and Salesforce Data Loader for streamlined data extraction, transformation, and loading.
    - Migration Testing: Pre-tested and pre-written migration queries within a Salesforce test environment.
    - System Integration: SWAN combined with other external platforms for easy data flow and reporting.
5. **Compliance and Security:**
    - Set up profiles and permissions to protect private data.
    - Test system meets legal and regulatory requirements.
6. **Change Management and User Training:**
    - More than 100 social workers were trained on SWAN and Salesforce functionalities.
    - Frequent queries and support materials were offered to minimize reliance on assistance and facilitate self-help.
    - Change management methodologies were employed to maximize adoption and notify individuals of advantages effectively.
7. **Quality Assurance and Testing:**
    - Directed the development of test plans and strategies, such as requirement and design reviews.
    - Controlled test execution cycles and defects with the aid of JIRA.
    - Directed testing teams of internal and external vendors during the Software Testing Life Cycle (STLC) and Software Development Life Cycle (SDLC).
    - Conducted User Acceptance Testing (UAT) sessions for user approval and readiness of the system.
    - Tested API functionality and integration of historical data through Data Loader, SOAP UI, and Postman.
    - Performed cross-platform testing for accessibility and performance.

8. **Launch and Ongoing Enhancement:**
    - SWAN was launched in phases, beginning with pilot groups.
    - Process times, user feedback, and system performance were regularly monitored.
    - Ongoing improvements were achieved through analytics and user feedback to ensure an agile improvement cycle.

3. Challenges & Solutions

The client in the SWAN project had to develop a case management application on Salesforce rather than a conventional .NET platform. The transformation came with challenges like a gap in Salesforce expertise, demanding extensive training in Agile development and testing methodologies, as well as a challenge in imagining the product because of the iterative nature of Agile development. The project team used Figma to make elaborate wireframes of the application's functionality and design. They conducted regular demos at the completion of each development cycle to demonstrate progress and get feedback from customers. They also showed healthy communication via interactive visual meetings that permitted customers to pose meaningful questions, align expectations, and clarify requirements.

Salesforce-powered case management systems such as SWAN have a set of important performance measures that consist of system usage, effectiveness in delivering services, user satisfaction, and service quality. They are founded on case management telemetry data and on Salesforce best practices. Key metrics in adoption and system use consist of client notes-related services delivered, client notes saved, intake documents, and case plans with ongoing action items. Operational efficiency metrics are Average Handle Time (AHT), First Contact Resolution (FCR), escalation rates on cases, and reduction in processing time [10]. Some of the Key performance metrics of a Salesforce-based case management system such as SWAN is presented in below Table 1:

Table 1: Key performance metrics for a Salesforce-based case management system like SWAN

Metric Category	Key Metrics	Insight
System Usage & Adoption	Service Deliveries, Client Notes, Intake Records	Measure engagement and activity levels
Operational Efficiency	Average Handle Time, First Contact Resolution, Case Escalation	Assess speed and effectiveness
User Experience & Satisfaction	CSAT, Response Times, User Adoption Rates	Monitor satisfaction and usability
System Performance & Scalability	API Usage, Error Rates, Uptime, Scalability Tests	Ensure reliability and growth capacity
Reporting & Analytics	Report Usage, Data Accuracy	Support data-driven decision-making

User experience and satisfaction measures are Customer Satisfaction Score (CSAT), monitoring of response time, and user adoption rate. System scalability and performance measures are API Throughput and Usage, error & exception rates, system availability and uptime, and scalability test results. Analytics and reporting measures are Report Generation Frequency, which quantifies the number of reports generated and consumed by managers and supervisors to monitor workloads and outcomes. Accuracy and completeness of data maintain the integrity and quality of input data during ongoing use and upon migration. There should be structured data showing the length of time it takes to resolve cases within a defined duration (e.g., monthly) to generate an informative chart demonstrating Average Case Resolution Time for your SWAN system. Following is a sample dataset and steps to draw your chart according to Salesforce best practices and search results is depicted in the following Figure 3:

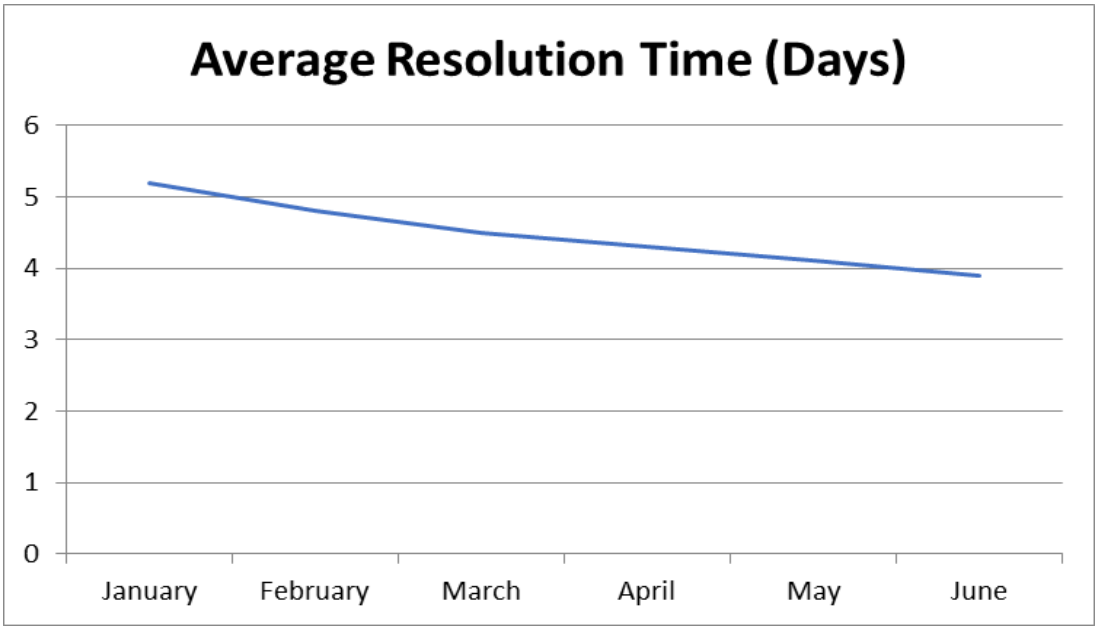

Figure 3: Average Case Resolution Time of SWAN system

4. Conclusion & Future Scope

Salesforce's platform has transformed social work case management by improving operations, enhancing referral accuracy, and improving transparency. The SWAN application has reduced case processing times, improved data accessibility, and social worker, supervisor, reporter, and partner communication. Training and change management strategies ensured high user adoption and productivity, and the functionality of the system has continually been enhanced according to user feedback.

The future of social work case management systems and SWAN will have the incorporation of Artificial Intelligence (AI) and Machine Learning (ML) to detect clients at risk and suggest optimal service plans. This will improve productivity and outcomes by streamlining resource allocation and prioritization of cases. The system will be mobile enabled, enabling social workers and clients to communicate at any time and from anywhere. Telehealth and virtual care functionality will simplify remote communication with clients, expanding service access in disadvantaged regions. More advanced reporting and analysis will be delivered through Tableau with Salesforce Einstein Analytics, while enhanced data protection and compliance will be required. Cloud and platform engineering advancements will improve scalability, reliability, and integration capabilities. Automation in quality assurance and testing will be more reliant on AI, and Social Determinants of Health (SDOH) data will be integrated to enable more in-depth client assessment and tailored interventions.

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