

Version 8.0 Release Notes Summary

Add-On Functionality Available for Purchase

CaseBot Reporting

CaseBot is a fully integrated, self-service, business intelligence tool that makes reporting goals achievable. CaseBot puts the reporting power back into your hands allowing you to access your data in real-time, set up advanced data queries and create reports that reveal key insights into your business.

Administrators

Database Encryption

Ramp up security in your database by employing up to three new security options including At Rest Data Encryption, Database Password Encryption and/or Authorize Users functionality.

MailChimp

Enjoy all the benefits of having a MailChimp account without having to leave the CaseWorthy application. Easily set up and manage Lists and Campaigns from one dashboard in the application.

Trigger Stored Procedure Upon Login

A stored procedure trigger that fires upon successful login is now available in baseline. The customer must define and provide the stored procedure or contract hours from CaseWorthy to build it for the trigger to function.

Two Factor Authentication/Expiration

Two Factor Authentication is an application setting created to increase security by requiring the user to enter a two-factor code to complete login.

Users

Building Readers

This unique functionality includes forms that manage book inventory and monitor student progress in a Reading program or similar educational group.

Domestic Violence Hotline Intake

This functionality includes the ability to complete an intake for Domestic Violence Victims. The dashboard contains forms that can be accessed repeatedly to enter information during and after the call, decreasing the potential for missed details.

FEMA Emergency Assistance Survey

The FEMA Housing Application workflow is intended to gather initial information for individuals who have been affected by a natural disaster. The workflow captures necessary information for anyone who will receive funding from FEMA.

Linkable Favorites

The Linkable Favorites functionality is used to create menu items from pinned favorites. This can be done anytime the Link property is available like on dashboards, the left-hand menu, buttons and more.

Seniors Dashboard

The new Seniors Dashboard consists of eight assessments. It also includes two forms relating to medical health, mental health and insurance.

Synced Outlook

CaseWorthy calendars now sync to Outlook which should save time by only having to enter appointments into ONE calendar.

VITA Portal

The VITA (Volunteer Income Tax Assistance) Portal is an easy way for IRS Certified volunteers to register to assist with income tax return preparation.

Enhancements to Existing Functionality

Calendar Recurrence Enhancement

This enhancement allows for greater control over intervals and length of time on recurring calendar appointments.

Client Duplicate Check Enhancement

Client Duplicate Check is now configurable including the ability to use And or Or logic which allows for enhanced filtering.

Column for Context

A new column labeled 'TableName.ColumnName for ContextID' has been added to the Context Types form to clarify how ContextType is used to define joins.

Group Case Note Enhancement

Group Case Note functionality has been enhanced to post the reference date for each individual group case note. The reference date appears on any forms that summarize a case note.

Health, Allergies and Tests Dashboard Enhancement

The Health and Allergies dashboard, located on the Case Management tab off Health Management in the All Features role, has been updated to be Health, Allergies and Tests and includes additional menu links for two new forms.

High-Charts Enhancement

An additional query rendering mode 'Pyramid' is available to be used in the query widget on dashboards.

Merge Enhancement

The Merge functionality now allows for the incorporation of custom tables into the Merge process.

Override Eligibility Enhancement

The ability to override any Enrollment Status now exists on the Enrollment Summary form. Only users with the User Category of 'Override Program Eligibility' will be able to use this functionality.

Print Functionality Enhancement

All forms included in a workflow can now easily be printed with the click of a button. Also, forms can be grouped, and specific selections can be printed.

Revision History Enhancement

Comments are now visible in the revision history under Form Management in the Form apBuilder.

Template & Report Header Redesign

Various templates and report headers, as well as their sub report headers, have been redesigned to include an updated look and feel.

Update All Family Members – Address Enhancement

The Add New Address form now includes the checkbox "Update All Family Members".

View File Enhancement

Use custom JavaScript to add a View File button to an edit form.