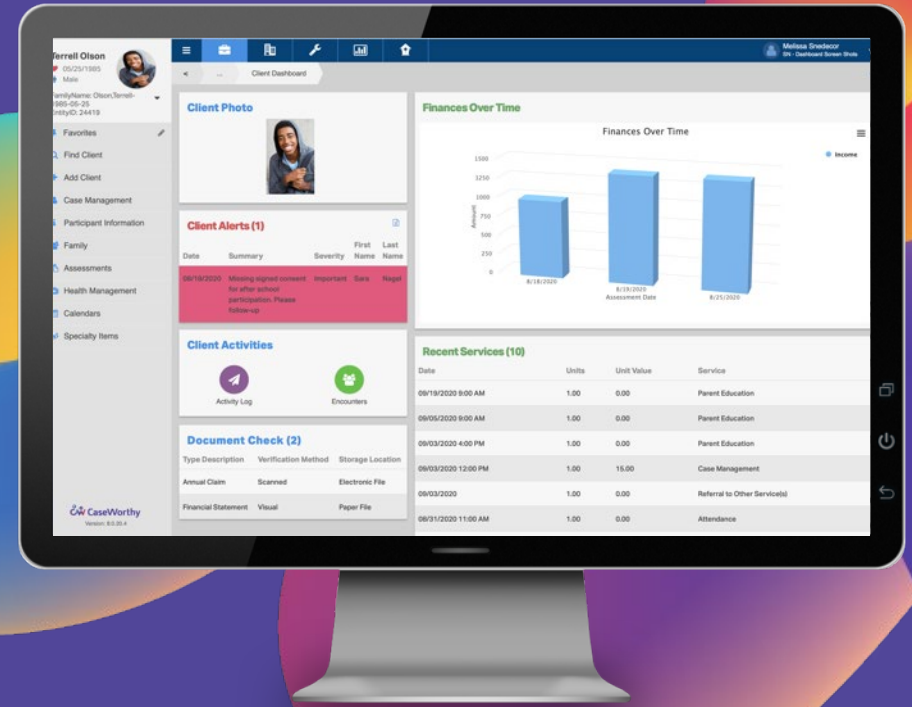


# A Flexible Case Management Platform

Built for the Way You Work

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# Introduction & Welcome

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**CASEY MCKEE**

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*Senior Sales Executive*

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# Agenda

CaseWorthy  
Overview

10 mins

CaseBuddy  
System Demo

40 mins

Navigation  
ApBuilder  
Case Management  
Reporting

Q & A

10 mins

Next Steps

5 mins



# Who We Are

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**Brian Bingel**

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*Chief Executive  
Officer*



**Rhett Richins**

---

*President*



**Nina Wilson**

---

*VP of Professional  
Services*



**Lauren Schmidt**

---

*VP of Sales &  
Marketing*



**Kathleen Allen**

---

*VP of Operations*

## OUR MISSION

To serve as a technology beacon that empowers organizations to enrich lives.

**Our Mission is to help  
you accomplish yours.**

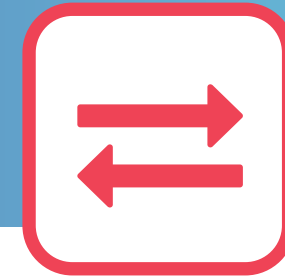
# Locally Configurable



- Role- Based Permissions
- Demographics & Intakes
- Surveys & Assessments
- Workflow Management



- Document Management
- Eligibility Management
- Service Delivery & Case Notes



- Sync to Outlook and Calendars
- Time Tracking
- Responsive Web Design

# CaseBuddy Features



Client Case File Access/  
Demographics



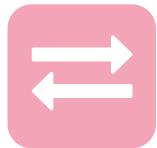
Common Intake



ApBuilder Light



Enrollment & Eligibility  
Workflows



Referrals (Internal & External)



Family & Contact Management



Document Management/  
Signatures



Treatment/Individual Service  
Plans



Assessments & Outcomes



CaseBot Light, Saved,  
Scheduled Reporting



## OVER 100 HUMAN SERVICE CLIENTS



General Case Management



Volunteer Management



Homeless Management



Youth & Family Services



Development Disability Services



Schools & Education



Health Services



Behavioral Services



Senior Services



Grants Management



# Why CaseWorthy?

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- Case Management Solution for Human Services
- Supported Eligibility
- Supported Workflows
- BI & reporting
  - How much time they spend doing reports, cut that time in half
  - Streamlined for you
- Secure: HIPPA Compliant



apBuilder Light



Reporting



Assessments





# What Sets Us Apart?

## IRON CLAD SECURITY

- Security & Uptime Goals
- Data Recovery
- Disaster Recovery
- Hardware Failure
- Backups
- Server Backups
- Database Backups & Encryption



The background of the slide features a blurred image of financial documents and charts. On the left, there's a vertical teal bar. The documents include a table with numerical values and a bar chart with three bars in blue, red, and yellow. Text fragments like 'Star Clamps', 'Exhi Corp', and 'with this statement, "The government of' are visible.

# What Sets Us Apart?

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## REPORTING & ANALYTICS

- Case Management Solution for Human Services
- Supported Eligibility
- Supported Workflows
- BI & reporting
  - How much time they spend doing reports, cut that time in half
  - Streamlined for you
- Secure: HIPPA Compliant

# Why CaseWorthy?

## RESULTS/BENEFITS TO CLIENTS

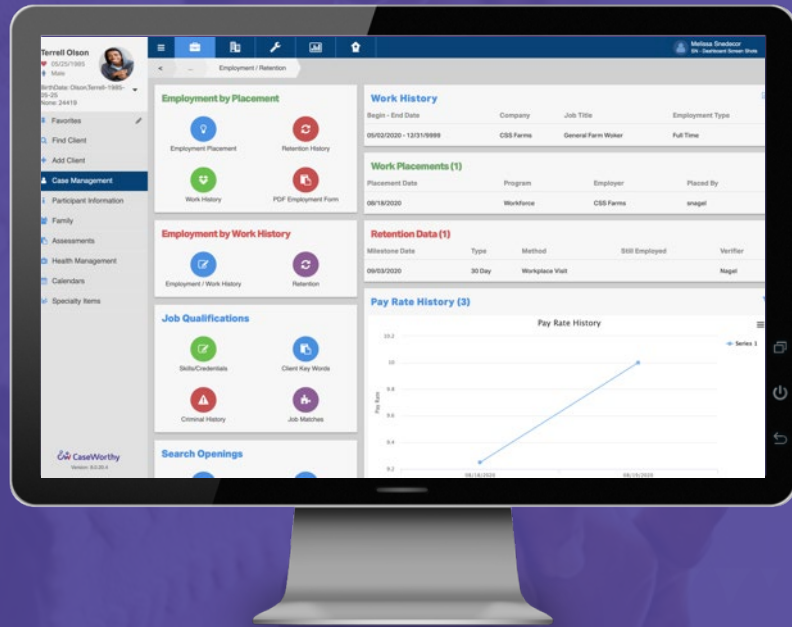
- Staff are supported in their daily work
- Increased operational efficiencies
- Ability to report and utilize data for performance improvement as well as grant and compliance based reporting



A team effort to offer the best system for each organization



# CaseBuddy Demonstration



# THANK YOU!



**CASEY MCKEE**

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 **CaseWorthy**