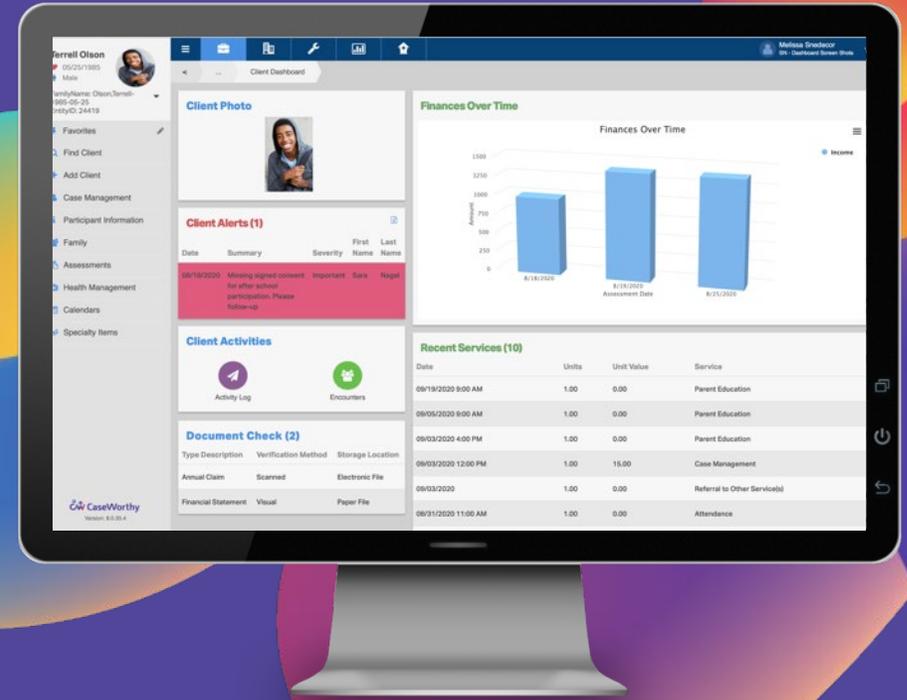# A Flexible Case Management Platform

Built for the Way You Work

CaseWorthy

Introductions & Welcome

Casey McKee

Senior Sales Executive

cmckee@caseworthy.com

Melissa Meisenheimer

Senior Sales Executive

mmeisenheimer@caseworthy.com

Agenda

CaseWorthy Overview	Overview	Case Management	Reporting	Q and A
10 Mins	**20 Mins**	**20 Mins**	**10 mins**	
• Introductions • CW Overview	• Navigation • Set up • ApBuilder	• Client Case Management • Intake – Victim Services	• Operational • Compliance • Analytics • BI Tool – CaseBot	• Q & A

Who We Are

Brian Bingel

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.

Programs We Serve

General Case Management

Domestic Violence/SA

Homeless Management

Youth & Family Services

Development Disability Services

Schools & Education

Health Services

Behavioral Services

Employment Services

Disaster Recovery

> The flexibility in CaseWorthy is my favorite feature. The ability to just pop in fields on the fly as we evolve and see what new type of questions or items we want to track. Adding that to an assessment cause is simple. Even building some simple reporting is pretty easy.

— Sheldon Kepiro, Director of Information Technology

Our Partners

COCOON HOUSE

CRIMINAL JUSTICE COORDINATING COUNCIL

LANE COUNTY OREGON

Communities In Schools

Community Action Partnership

Goodwill of North Georgia

Enterprise Wide Solution

FOR HUMAN SERVICES

- Rules
- Dashboards
- Form Creation
- Roles & Menus
- Workflow Customization

- Case Management Platform
- Self Service Portal for Self-Reporting and Updates
- Incident Tracking
- Advanced Security

- Workflow Engine
- Document Management
- Configurable Alerts
- Electronic Signatures
- Crisis Line Documentation
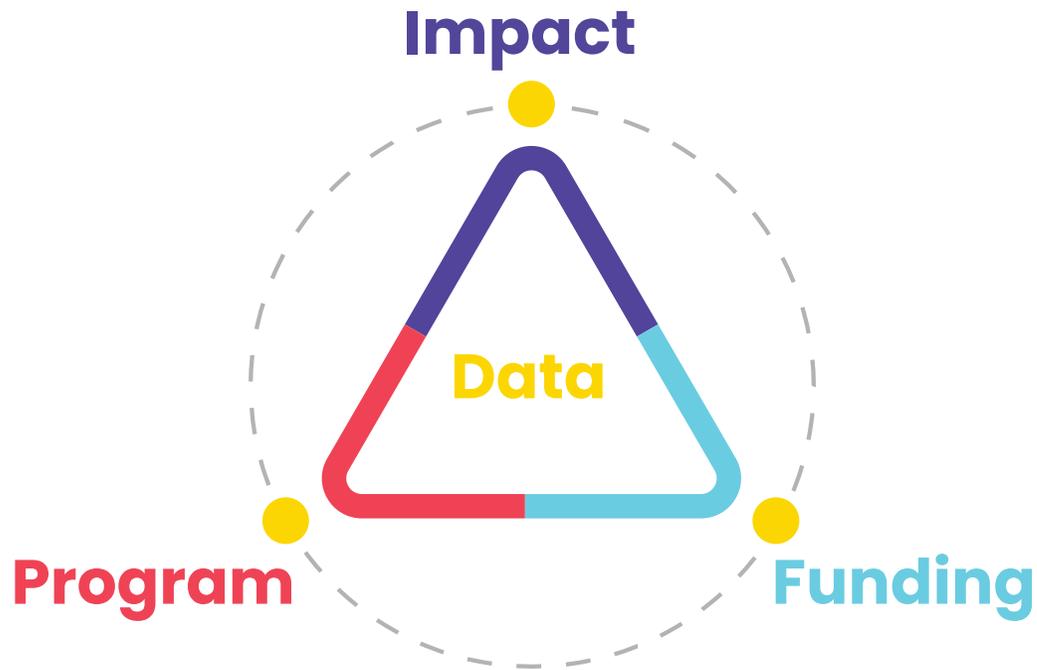
Victim Services

Case Management Needs

o Addressing Creative Ways to Help Those Unreported Cases

o Safety & Security of Data

o Focus on Emergent Needs & Alerting Appropriate Staff

o Collaboration Across Programs

o Compliance Reporting

Why CaseWorthy?

FLEXIBLE AND ROBUST REPORTING & ANALYTICS

Impact

Data

Program

Funding

- Client Interaction Captured Across Enterprise

- Unduplicated Client Counts

- Exportable Queries

- Performance & Operational Reporting

- Compliance & Grant Reporting

- Analytics Engine

Why CaseWorthy?

BENEFITS TO CLIIENTS

- 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

- Better help the clients they serve/have a greater impact on the community they serve

- Be able to provide a 360 degree view of the services each client needs

apBuilder

Reporting

Integration

CaseWorthy Demonstration