A Flexible Case Management Platform

Built for the Way You Work
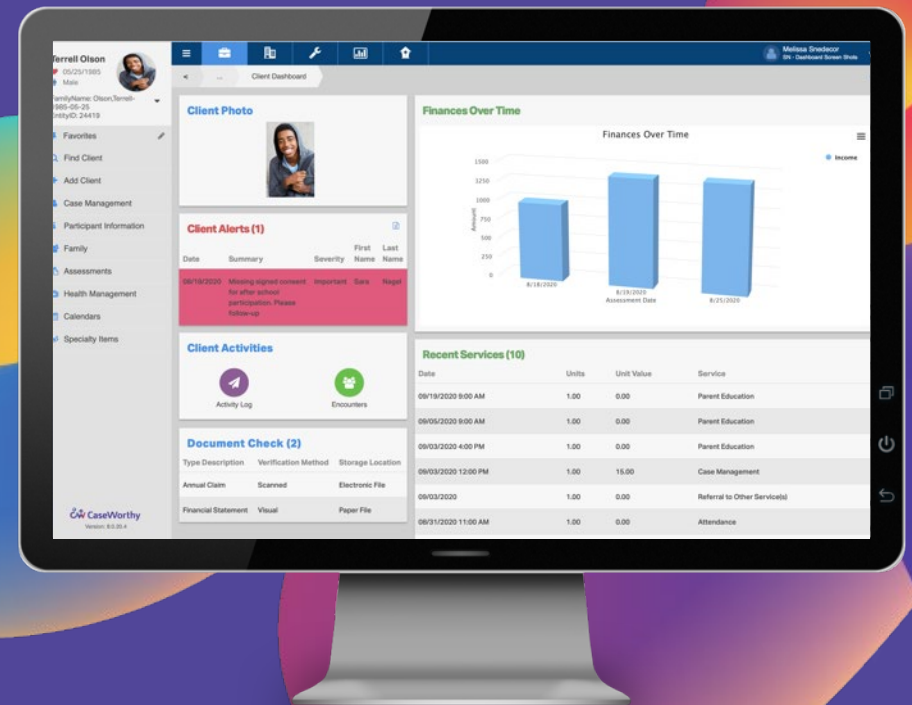
CaseWorthy

Introductions & Welcome

Sara J. Nagel, MSW

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Agenda

| CaseWorthy Overview | Web Portal Demonstration | Enterprise Demonstration | Q & A |

10 mins

- Executive Team
- Experience
- Professional Services
- Why CaseWorthy

15 mins

- Service Recipient View
- Dashboards
- Navigation
- Update information
- Job Matches

25 mins

- Case Manager/Employee view
- service recipient's updates
- Employment Dashboard
- Reporting

10 mins

- Questions are welcome throughout today's presentation!
- Use the chat or question box in the go to webinar tool bar

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.

Progams We Serve

General Case Management

Volunteer Management

Homeless Management

Youth & Family Services

Development Disability Services

Schools & Education

Health Services

Behavioral Services

Senior Services

Grants Management

> 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

Enterprise Wide Solution

FOR HUMAN SERVICES

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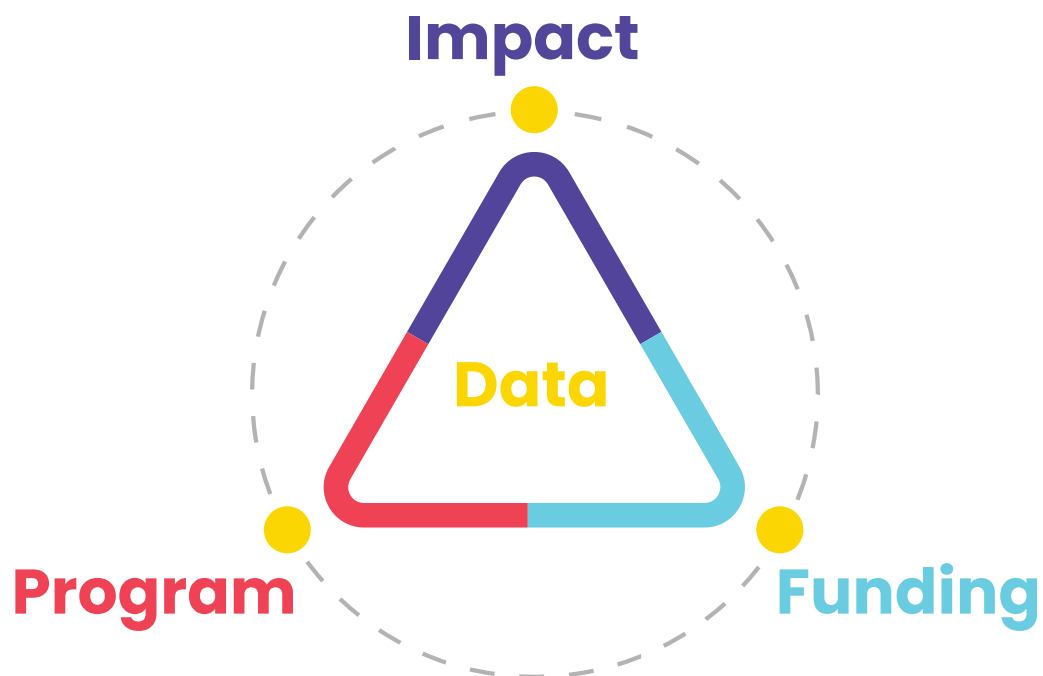- Workflow Customization

- Case Management Platform
- Available Web Portal
- Billing
- Advanced Security
- Eligibility Engine

- Workflow Engine
- Document Management
- Configurable Alerts
- Time Tracking
- Electronic Signatures
- Sync to Outlook and Calendars

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

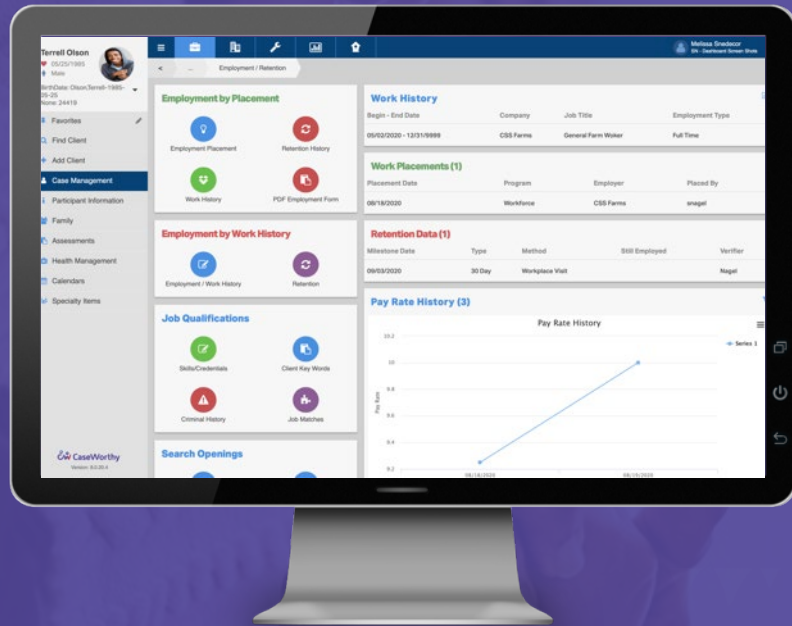- Be able to provide a 360 degree view of the services each client needs

apBuilder

Reporting

Integration

CaseWorthy Demonstration

Professional Services

IMPLEMENTATION INCUDES

- Discovery Session

- Solution Build

- Training on How To Use Tools

- Ongoing User Support

- Administrator and End User Training

A team effort to offer the best system for each organization

What Sets Us Apart?

IRON CLAD SECURITY

- Security & Uptime Goals

- Data Recovery

- Disaster Recovery

- Hardware Failure

- Backups
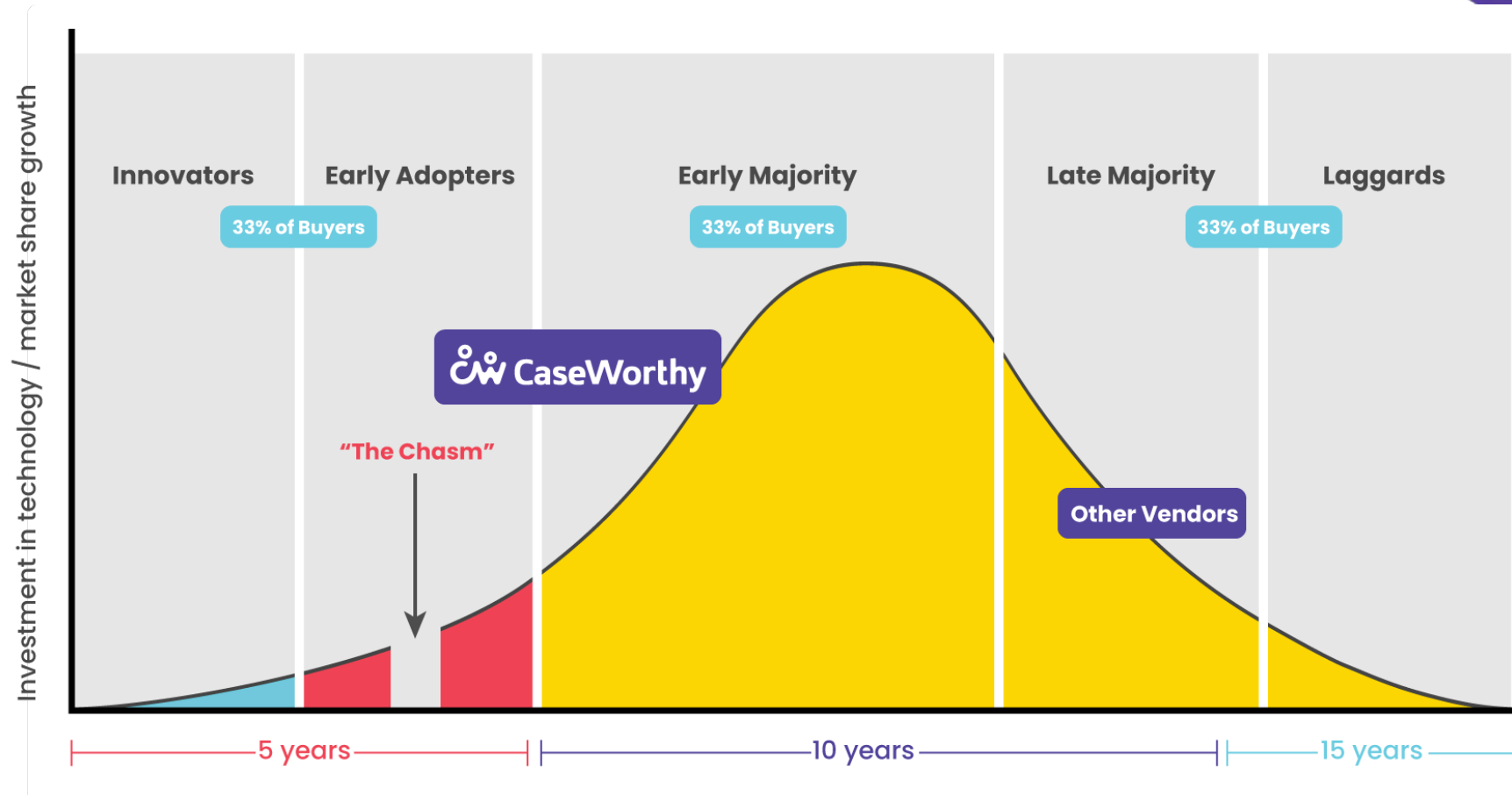
- Server Backups

- Database Backups & Encryption

What Sets Us Apart?

REPORTINIG

- Excel Reports

- Carts & Dashboards

- Operational Reports

- Compliance Reports

- PDF Templates

- Analytics

- CaseBot

Our Technology

FQHC Community Solution

THE PERFECT SOCIAL TECHNOLOGY TO COMPLIMENT YOUR EMR SOLUTION

Complement your medical tracking system with a complete care profile – social and medical

Key Benefits

- Share data in a central database

- Coordinate services through a community referral network

- At a glance, comprehensive client history of all services

- Create automated individual care plans

- Simplify tracking and reporting with real-time outcomes

- Automated processes and workflows

Employment Services

HELP PEOPLE GET THE SKILLS, TRAINING & SUPPORT THEY NEED TO LAND THE RIGHT JOBS

CaseWorthy Currently Serves
25+ Goodwill Customers

Key Benefits

- Job Matching and Placement

- Accurate Reporting
  - Compliance Reports
  - Operational Reports
  - Ad Hoc Reports

- Track / Record Demographics & Outcomes

- Collaborate with Other Agencies

- Goal Outcomes

- Export Data

- Intake Approach

Case Study

DENVER RESCUE MISSION

The Denver Rescue Mission (DRM) is the oldest, full-service Christian charity in the Rocky Mountain region. Since 1892, the mission has met the needs of people experiencing poverty and homelessness by providing outreach services, long-term rehabilitation, and housing assistance.

"CaseWorthy has proven to be true to its word and continued to stay ahead of technology – constantly growing its case management software. They're dependable, constantly solve problems, and always keep up with our needs at the Denver Rescue Mission."

–John Morarie, Manager of Impact and Strategic Initiatives for Denver Rescue Mission

Problem

- Home-grown database couldn't keep up with needs
- Inefficient day-to-day operations
- Cumbersome incident reporting process

Solution

- Operational efficiency with customizable and automatable workflows
- Accurate incident reporting
- Simple

Professional Services

KICK OFF

Kick-Off Call to introduce your implementation team and review contract details

DISCOVERY CALL

Discovery call to review current programs, workflows, forms and reports

Professional Services

MEETINGS WITH YOUR PROJECT MANAGER

You will receive weekly updates an issues, new maintenance updates and things happening at CaseWorthy.

Full access to our customer support portal where you can look up documentation, turn in issues, look up status of your issues and so much more!

Something that has stood out from the rest of CaseWorthy's competitors is the support we have received. I appreciate having one person to support us and knowing that if I have a problem, I don't have a to repeat what is gong on over and over again. Our account manager knows our history and can help us instantly. We've heard from our coworkers what an advantage this is as most businesses have a call center.

- Alex Price, Data Project Manager for Cocoon House

THANK YOU!

Name

Title

Email
phone

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