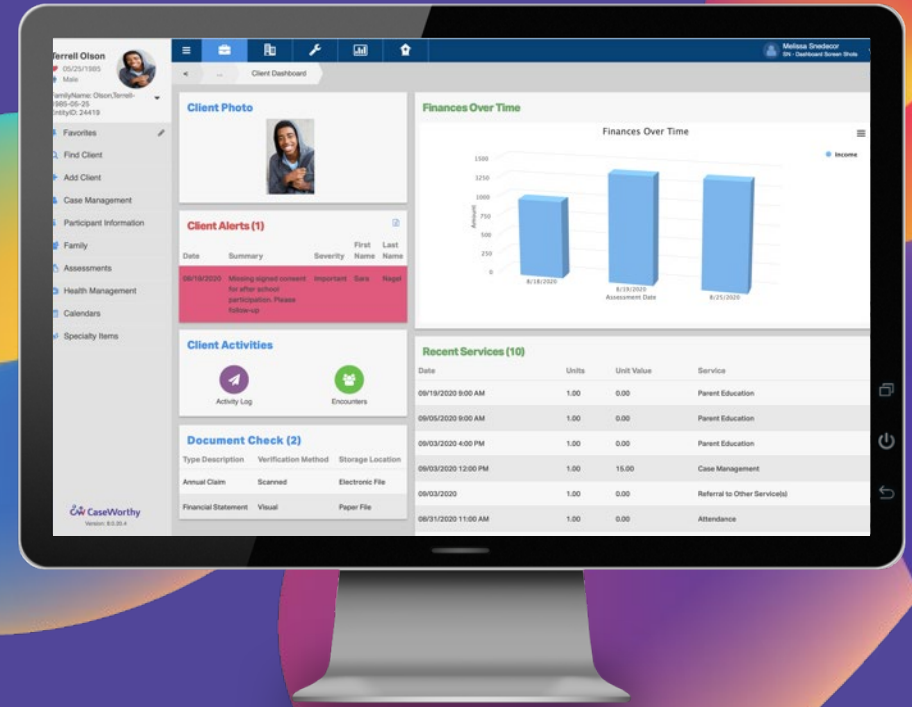# A Flexible Case Management Platform

Built for the Way You Work

CaseWorthy

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

Employment Services

Homeless Management

Youth & Family Services

Development Disability Services

Schools & Education

Health Services

Behavioral Services

Senior Services

Grants Management

Enterprise Wide Solution

FOR HUMAN SERVICES

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

- Case Management Platform
- Available Web Portal
- Service Tracking
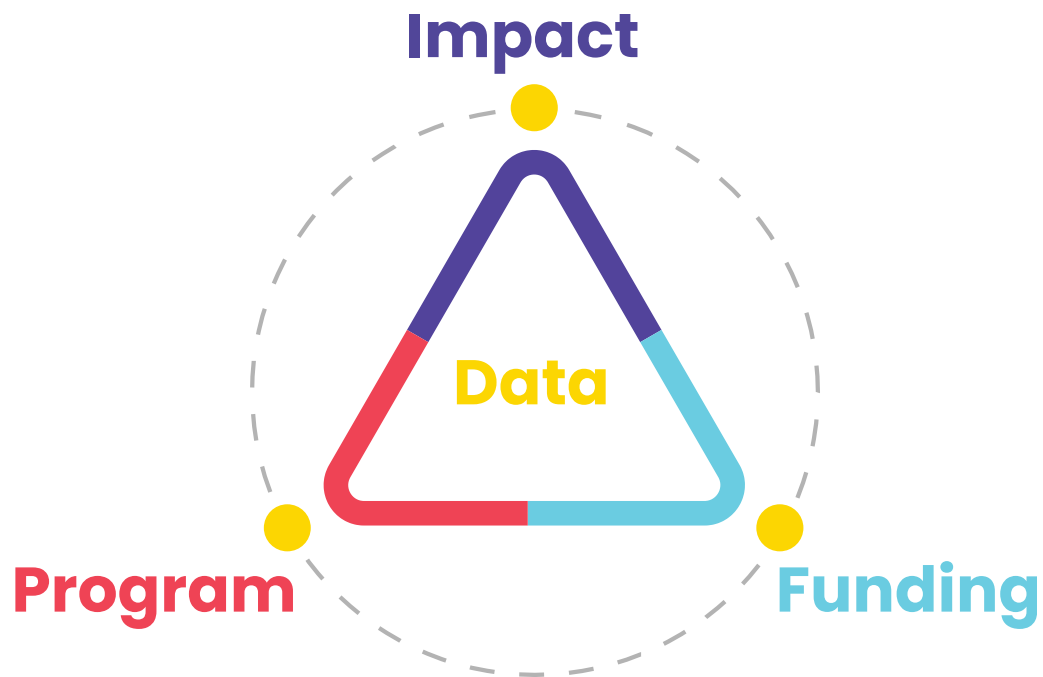- Eligibility Engine

- Workflow Engine
- Document Management
- Configurable Alerts
- Electronic Signatures
- Case Notes

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

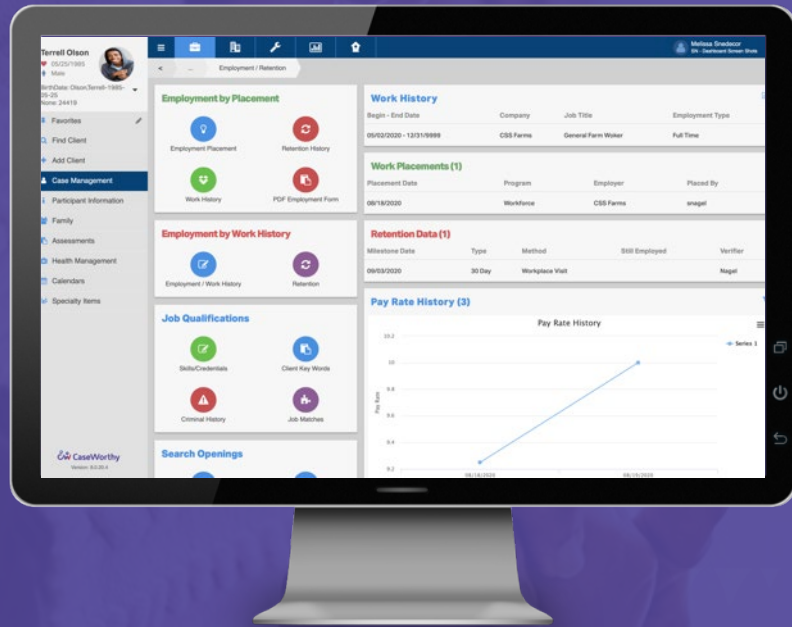- Be able to provide a 360 degree view of the services each client needs

apBuilder

Reporting

Integration

CaseWorthy
Demonstration

![CaseWorthy — Your Scalable Case Management Solution]

CUSTOMER SUCCESS TEAM:
WHAT WE DO

CaseWorthy's Customer Success Team is dedicated to building meaningful relationships that support our customers in their technological endeavors as they serve within their communities.

An account Managers is assigned to each customer as they are the customer's primary contact and advocate. The Account Manager is dedicated to developing and maintaining relationships with the customer's System Administrators, and meets with the customer on a monthly basis.

While working with System Administrators, the Account Manager works to understand the needs of the customer in terms of data collection and how they use CaseWorthy.

Their understanding of the system allows them to support the customer by:

- Addressing questions about topics covered in the System Administration classes
- Following up on open projects and SOWs
- Updating issues in the Customer Support Portal in a timely manner
- Promptly communicating any concerns the customer might have to the Team Manager

SYSTEM ADMINISTRATORS

System Administrators are also vital as they are the primary contact between their organization and CaseWorthy. Customers are required to have at least one, and no more than two, designated System Administrators.

As System Administrators strive to build and maintain a relationship with their Account Manager, they work to:

- Maintain regularly scheduled meetings
- Report questions or concerns to their Account Manager
- Work with their Account Manager to resolve issues by providing additional details upon request
- Stay informed of updates that CaseWorthy communicates via email

If you are not receiving emails from our Mitch Wrapp email address, be sure to inform your Account Manager.

System Administrators are required to successfully learn how to use the CaseWorthy application in order to ensure they are familiar with and know how to implement all baseline functionality.

This requirement includes and is not limited to successfully completing the System Administration Training Package which includes the follow courses: System Administration, Case Management, Form apBuilder and Reporting & Analytics.

CASEWORTHY DATABASES

Customers are provided three CaseWorthy Databases. System Administrators are to be familiar with and monitor these regularly.

▸ **USER ACCEPTANCE TESTING (UAT)** – This environment receives updates for testing purposes before they are moved into production environments. As customers may have a significant number of custom- configured features, testing in this environment during the UAT period is vital. Do not build or fix things in this database as it is only for testing and will be overwritten with each UAT!

▸ **TRAINING** – This is the environment used before go-live for custom configuration. At go-live, all configuration is moved to Production. Then this database is used for training staff as well as building and testing custom functionality before applying it to Production. The Training database is not automatically updated to match Production in terms of entered data or custom configuration. Please enter a request to do so through your Account Manager.

▸ **PRODUCTION** – This is the live environment in which day-day to application activities are performed.

SUPPORT PORTAL

CaseWorthy's Support Portal is comprised of Issues Management and training materials which include "How To" videos as well as Documentation resources.

ENTERING/TRACKING ISSUES IN THE SUPPORT PORTAL

Application issues are to be submitted through the Customer Support Portal by the System Administrator using the template provided to assure all required details are included.

System Administrators are to:

- Vet issues which are reported by users before reporting them in the Support Portal
- Keep track of all issue updates through the Portal
- Promptly test the issue and update the issue's status once informed that a reported issue has been resolved
- Update tickets with more details, or close the ticket within 2 weeks, once resolved

Issue ticket priorities are classified as the following:

HIGH — This includes any error that renders continued use of the Application either impossible, seriously impractical and/or interrupts the normal business operations of the Customer

MEDIUM — This includes any material non-conformance of the Application involving specifications or documentation that is not a class 1 error (High)

LOW — Anything that is not class 1 (High) or class 2 (Medium) error

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

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

IMPLEMENTATION

A team effort to offer the best system for each organization

CaseWorthy values each client and begins our partnership with a Discovery session to introduce ourselves, understand the client's goals for the project and review all of your programs and processes.

KICK-OFF
- Smooth transition from the purchasing phase of software to the implementation phase
- Review overview of software needs
- Discuss implementation process, team responsibilities, and next steps

DISCOVERY PROCESS
- Meet with your agency to learn, first hand, your business processes and data needs
- Review current programs, workflows, forms, and reports
- Interview key team members to uncover pain points and brainstorm workflow improvements
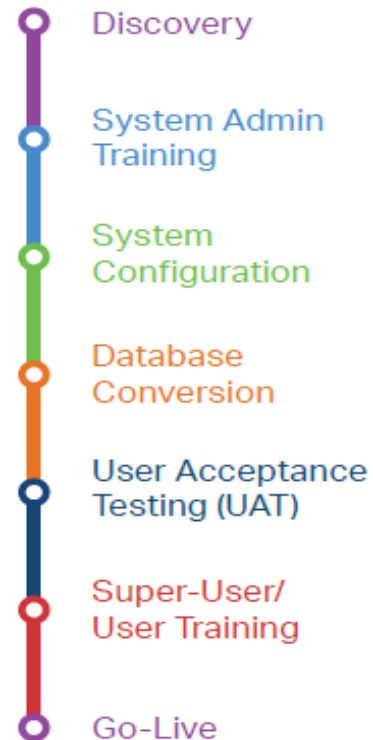
TRAINING
- Guide client in dashboard and workflow setup; client can own the dashboard setup for each role
- Live System Admin, apBuilder, and CaseBot reporting training
- Walk through of system features & configurations
- Library of recorded trainings

SOLUTION BUILD
- Turn-on and setup of CaseWorthy features and functions
- Configuration of forms & reports blueprinted during Discovery
- Regular check-ins to manage timetable and budget
- User acceptance testing & configuration approval

PROCESS STEPS:

- Discovery
- System Admin Training
- System Configuration
- Database Conversion
- User Acceptance Testing (UAT)
- Super-User/ User Training
- Go-Live

> 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.
> – Alex Price, Data Project Manager for Cocoon House

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

IMPLEMENTATION PROJECT TIMELINE:

WEEK 0

Project Initiation

Sales Hand off & Kick off Meeting

Start of Project Plan

WEEKS 1-3

Homework

Customer documents their business processes

Calls held with CW team to review homework progress, plan discovery session, and complete high level review of programs before on site visit.

WEEKS 4-5

Discovery Prep

Business Analyst reviews client homework and their discovery documents.

WEEK 6

Discovery Process

Discovery sessions to review each program and establish "what" the system needs to accomplish.

WEEKS 7 OR 8

Training Starts

Customer completes Case Management and System Administration training in the weeks following discovery.

WEEKS 7-8

Requirements

Business Analyst completes the Requirements Document.

Business Analyst sends follow up questions to customer as needed.

WEEKS 9-10

Client Review and Sign off

Customer approves and signs off on the Requirements Document.

WEEKS 9-11

Functional Specifications

Functional Specifications are developed by the Business Analyst and CaseWorthy Product Team.

Functional Specifications begins to document "how" CW will meet the needs identified in discovery. It outlines which items can be accomplished baseline versus items that require customization.

This document is a blueprint for CaseWorthy staff to reference through the implementation.

WEEK 12

Project Plan

A first draft of the project plan is completed and reviewed with the customer.

WEEKS 12-14

Technical Design Document(s)

Systems Analyst prepares Technical Design Document for each program, outlining the tables and columns that will be used.

(Weeks involved depends on complexity of programs).

NEXT STEPS:

BASELINE & CUSTOM CONFIGURATION

- Upon approval of the technical design document, Systems Analyst team builds deliverables in train database.

- Customer configures baseline functionality with consultation from CW resources as needed in train database.

USER ACCEPTANCE TESTING

- Customer conducts user acceptance testing as custom builds are completed.

- Customer signs off on builds after passing testing.

TESTING

- If desired and hours allow, CW resource will call to train Customer staff on the completed system.

- Customer trains their super users and end users on completed system.

GO-LIVE

- Train site made into a live production site.

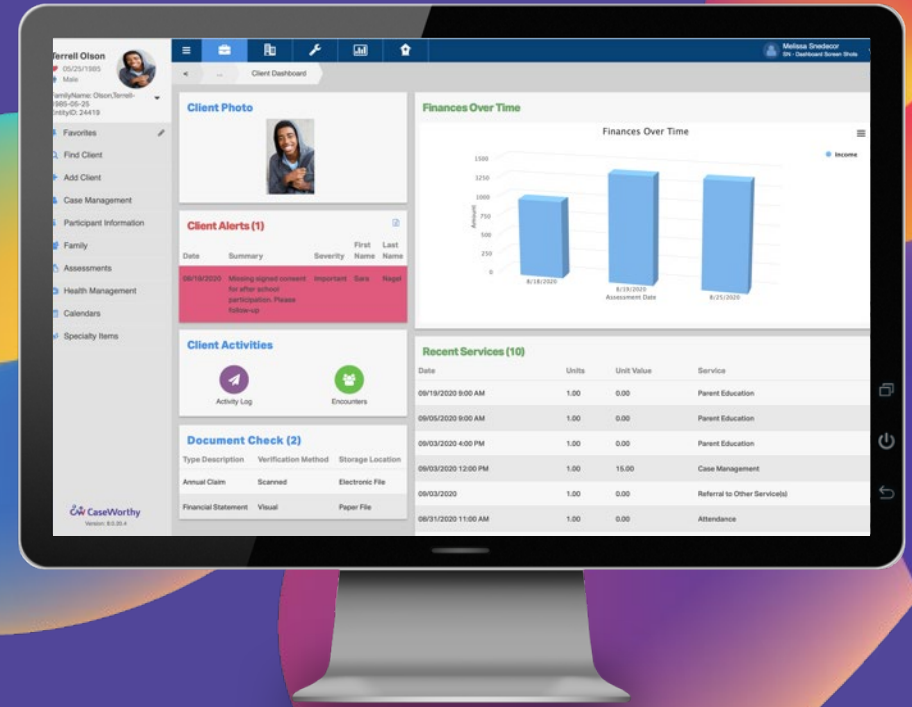- End users begin data entry.

TRANSITION TO SUPPORT

Customer transitions to CW account manager and receives ongoing support via support portal.

A Flexible Case Management Platform

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CaseWorthy

Introductions & Welcome

Casey Mckee

Senior Sales Executive

Melissa Meisenheimer

Senior Sales Executive

Darius Beverly

Director of Product

Brandon Bird

Internal Projects – System Analyst

Kathleen Allen

VP of Operations

Paparao Gummadpu

VP of Development

Day Two Agenda

CaseWorthy Introductions	Financial Tracking & Accountability	Break	Additional Technology	Q & A

9-905	**905-1045**	**1045-11**	**11-12**	

9-905

- Day 2 Agenda Overview
- Introductions

905-1045

- Financial Tracking
- Financial Reporting
- Data Migration
- Q & A

11-12

- Security
- Logging
- Backup
- APIs
- Integrations

DATA CONVERSION REQUIREMENTS

FIELD DEFINITION DOCUMENT

Field Name	ClientID	FirstName	MiddleName	LastName	BirthDate
Data Type	INT	nvarchar(50)	nvarchar(50)	nvarchar(50)	Date
LookUp List/Table					
Field Definition	A valid Client ID from the customer's system				
Required?	Required	Required	Optional	Required	Optional
Default value		FirstName		LastName	
Data Quality Check	Verify that each value is unique				

OVERVIEW

Welcome. The purpose of this document is to provide you with information about CaseWorthy's data conversion requirements and how they will affect your conversion to CaseWorthy.

If you plan to import data into CaseWorthy from one or more existing systems, please continue to read below to get an overview of the data conversion requirements. If you do not plan to import any data during your CaseWorthy implementation, you do not need to read this document.

YOUR DATA ➔ CASEWORTHY DATABASE

CUSTOMER REQUIREMENTS

If you plan to import data into CaseWorthy, your contract will include a Data Conversion clause similar to this.

The Data Conversion services require Customer to provide the data in a format compatible with CaseWorthy's "staging table" methodology.

CaseWorthy's staging tables are a group of baseline tables that contain a format for the data you will be importing into CaseWorthy. These tables have predefined fixed data types and often have predefined values that must be used in certain fields. Let me give you an example.

The Data Conversion services require Customer to provide the data in a format compatible with CaseWorthy's "staging table" methodology.

If you are entering Client data, you will reference the field definition document as you format your data. You will provide a ClientID, First Name, etc. The Name fields have a data type of nvarchar, which is a free text field. You are free to enter almost any character as long as the length does not exceed the value in parentheses. Birthdate is a date-type field which requires the data to be in a date format. The name and date columns are straight forward and fairly easy to complete.
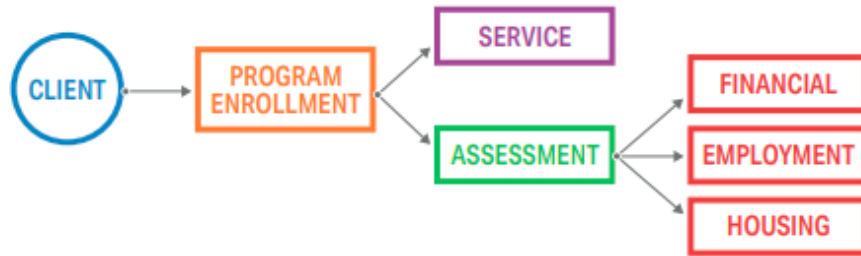
DATA CONVERSION

Field Name	Gender	PrimaryLanguage	Ethnicity
Data Type	INT from the options below	INT from the options below	INT from the options below
LookUp List/Table	1	133	7
Field Definition	1 - Male 2 - Female 5 - Other 6 - Don't Know 7 - Refused 8 - Transgender Unknown 99 - Data Not Collected	1 - English 2 - Spanish See LookUpValue ta for additional option	1 - Non-Hispanic or Latin 2 - Hispanic or Latino 8 - Don't Know 9 - Refused 99 - Data Not Collected
Required?	Optional	Optional	Required
Default value			
Data Quality Check			Verify that this field is nc null

The "data conversion" part of the ETL process involves columns like Gender, Primary Language and Race. These fields have preset values that must be used. Let's look at Gender, for instance. If your software uses the letter 'M' for male, you will need to convert the 'M' to a 1 in your staging table. You would do the same for Primary Language, Race and so on. CaseWorthy will provide a list of the mapping values. We will also provide support and guidance in data mapping and formatting. The bulk of the data conversion task, however, will be the customer's responsibility.
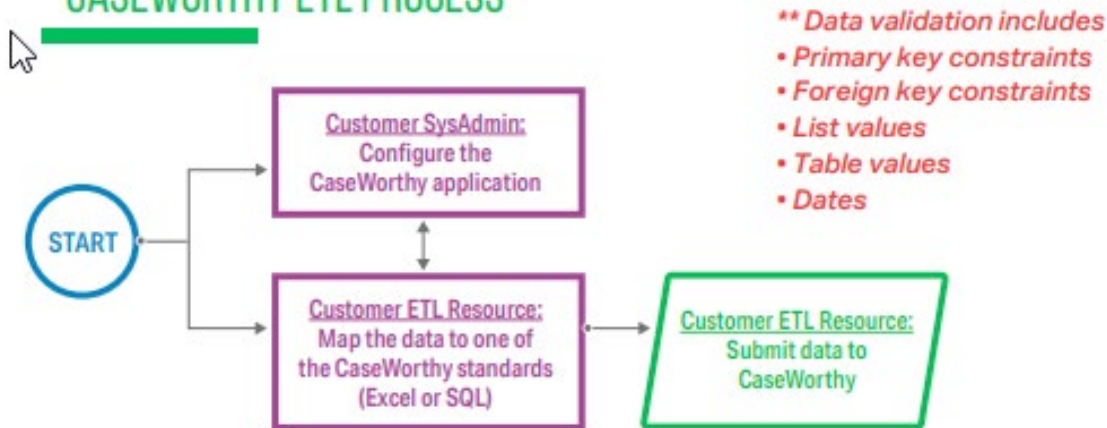
CASEWORTHY WORKFLOW

The data conversion task may also include mapping the data from the customer's workflow to CaseWorthy's. For instance, In CaseWorthy, each Clients must be enrolled in a Program before they can have Services or Assessments. You may need to create Assessments even if your current system does not have them.

Depending on the customer's current system, this may be an easy transition or a difficult one.

CASEWORTHY ETL PROCESS

** Data validation includes
• Primary key constraints
• Foreign key constraints
• List values
• Table values
• Dates

The ETL process begins as the customer's System Admin and ETL Resource work together to identify the data that needs to be imported into CaseWorthy. A CaseWorthy team member will provide guidance during this process. The customer will populate the staging tables and send them to CaseWorthy for review.

CaseWorthy will run the data through a custom data validation tool. The tool will identify the most common errors in the data. Any errors that are discovered will be reported to the customer for resolution. The customer will resolve the errors and resubmit the data. This process will be repeated as many times as necessary to resolve all issues.
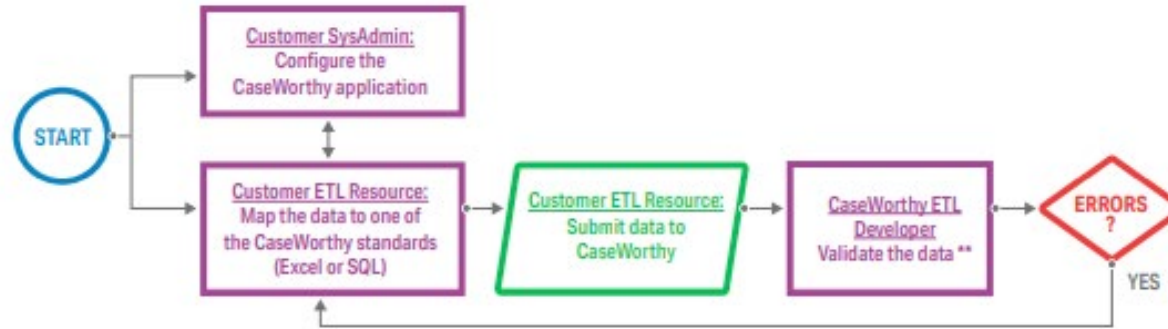

Once the initial errors are resolved, CaseWorthy will import the data into a custom ETL database. The customer will be able to see the data and test it using the CaseWorthy application. Here, again, the process will go through the loop several times until all errors are resolved. Each time, the data must be resubmitted and the entire process will start over again.
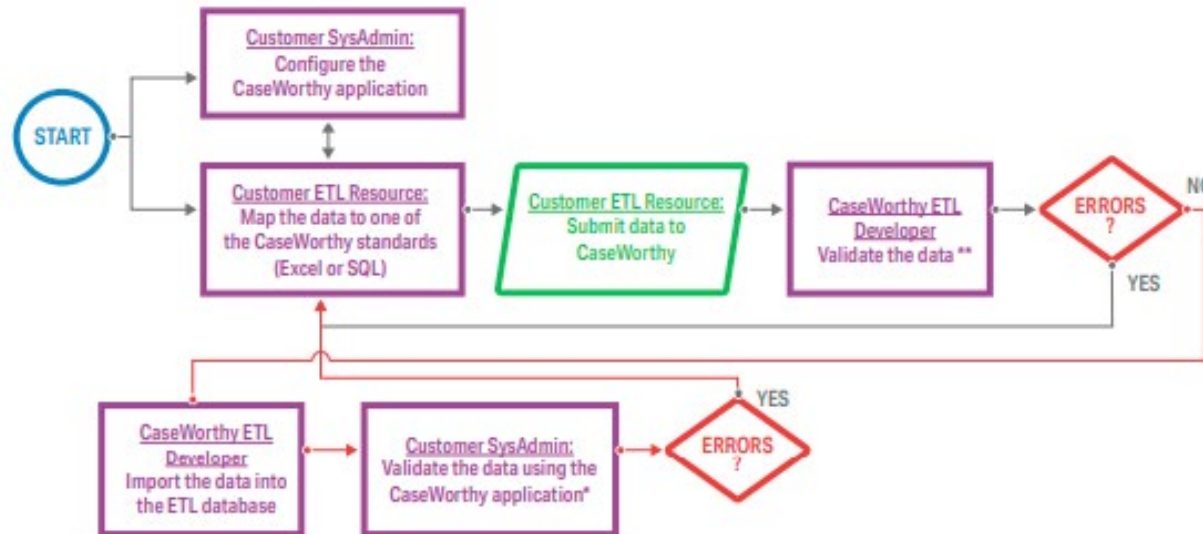
CASEWORTHY ETL PROCESS CONT.

Once an error error-free data set is obtained, the data will be imported into the Production system.
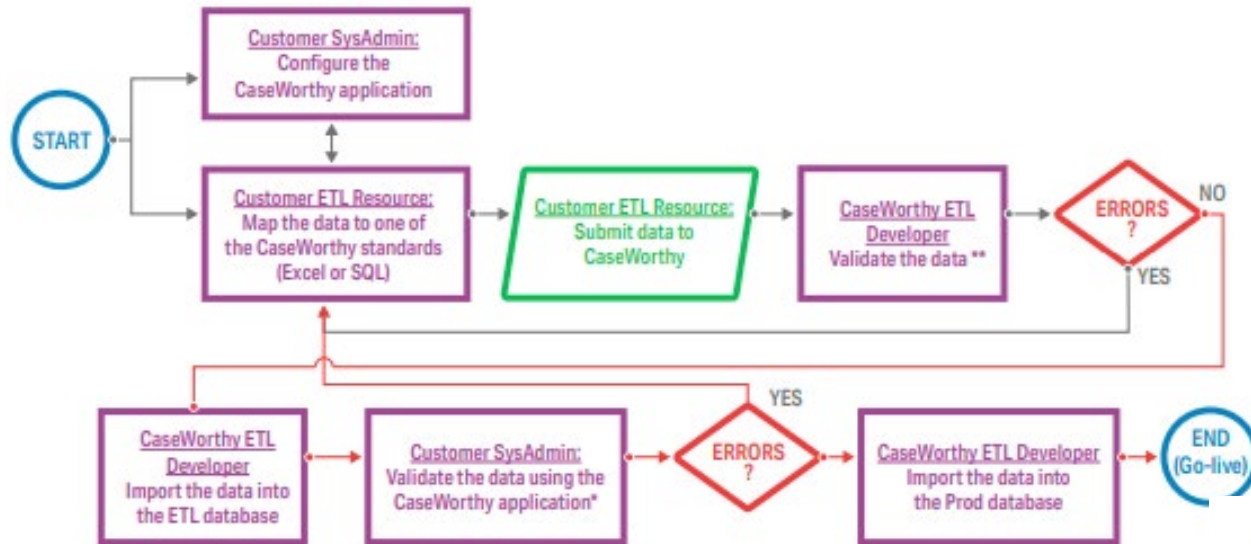
LEVEL OF EFFORT

- The data conversion task can be a huge effort, especially if your team has never done this type of work before or if you do not have the resources to do it.

- Depending on your data, you may have to map 50 to 100 baseline fields. If your data includes custom columns and tables, that number can go up significantly.

- You may also need to convert your data to CaseWorthy's workflow schema.

- Be prepared to send your data to CaseWorthy five to ten times for a small, baseline

- ETL and additional times for custom tables and columns.

- It is common for a customer to spend several weeks or months working on the ETL.

- Some customers have hired third party vendors to help with the data conversion process.

CaseWorthy Enterprise System Architecture

Presentation	Personalization	Content Customization

Content Management (apBuilder)	Workflow	Rules Engine	Reporting

Session Management Services	Exception Management Services	Authentication Services	Authorization Services	Encryption Services

Data Services	Caching Services	System Monitoring Services

Reporting Data Warehouse	Platform Databases	Global Configuration DB	Customer DB #1	Customer DB #2

← **Presentation Services**

ASP.NET, HTML5, CSS3, AJAX

← **Shared Business Services**

ASP.NET Core, C#

← **Shared Platform Services**

ASP.NET Core, C#, AES FIPS 197, Active Directory (LDAP), SAML 2.0

← **Database Services**

SQL Server 2016, SQL Reporting Server 2016