How to Evaluate Case Management Solutions

Top 10 Things to Look for in a Case Management Software

CaseWorthy™

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What is Case Management Software?

Nonprofit organizations do a lot of detailed, in-depth work on a daily basis to serve their clients. In order to organize cases and administer programs and services, they need the right tools and software. A robust, well-developed case management software can be implemented throughout an organization at many levels. Data administrators use case management solutions to input, track, and efficiently generate reports related to clients, funding, staff, and more. Case managers can use the tools to communicate with clients, process forms filled out by clients, record case notes, schedule appointments, and perform numerous other tasks. Case management software should ultimately act as a master digital tool that makes it easier for your organization to efficiently process and organize client data.

When all the data is in one place, it's easier for nonprofits to analyze if programs are purposeful and adjust as needed. Furthermore, nonprofits can set themselves apart with an excellent case management software by showcasing outcomes with reporting functionality.

"Case management software collects data, and makes it easier for nonprofits to leverage the data to receive more funding and create greater impact."

How Do I Choose the Right Case Management Software?

Your organization is unique, and has unique needs. In many cases, transitioning to or starting with a new case management system is a significant investment of both money and resources.

"It's crucial for your organization to select a solution that will help you streamline processes, operate more efficiently, and ultimately better serve your community."

For nonprofit and government organizations working in the Health and Human Services (HHS) sector, these systems act as a resource and communication hub that stores and tracks client data, fosters the relationship between case managers and clients, facilitates collaboration among staff members, and supports in meeting compliance standards for grants and parent organizations.

This guide will walk you through just about everything you need to know as you compare your options. Whether you work for a small organization just starting out or are well established with a case management system already in place, the following **ten factors** are essential components that every modern case management software system on the market should offer. It will also provide you with examples that will help you understand what to look for and what to ask.

10 Things to Look For in a Case Management System

Intuitive User Interface

01

A case management system can look great and sound like an excellent resource when you're first researching it. But if the software is difficult to use and not intuitive from the beginning, it can feel like using a cumbersome, off-the-shelf system built for all clients rather than a system built for each individual, unique organization. **Case management software should be laid out in a sensible way that allows staff to access critical information, workflows, and processes with just a few clicks.** Sometimes software that has robust features can seem complicated and overwhelming to staff as they acclimate to the new system. You want a robust, comprehensive system that can meet all of the organization's unique needs while still feeling user-friendly. It's critical for your team to feel comfortable and confident in their ability to use your case management software. One capability that can make the learning curve easier is the option to restructure and reconfigure to accommodate the way your organization works. If your staff members anticipate locating a certain feature in one spot, but it's buried deep within the software it's inefficient.

Considering the advanced nature of consumer technology today, the user interface should also lean on algorithms and incorporate prebuilt template sets to assist with collecting and documenting information. With these intelligent four features, your case management system can help translate data into solutions that work for clients. In an industry where time is often of the essence, it's important to minimize roadblocks to your productivity. So make sure the case management software that you choose has plenty of ways to easily manage workflows the way you need it to.

Client-Friendly Features

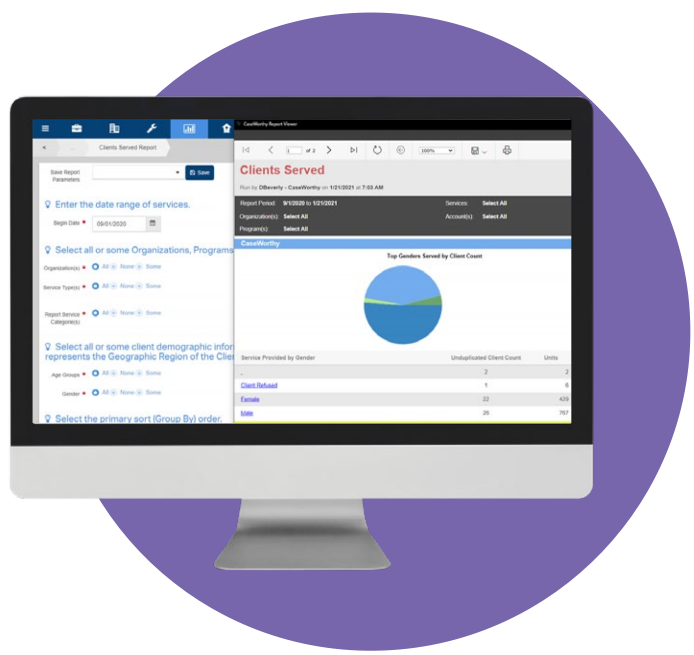
02

If your goal is to use a client-friendly case management system—and it is for increasing numbers of humanitarian organizations—make sure the systems features are simple and intuitive for clients. **A case management system should ultimately make it easier for your organization to provide services, and that often starts with making it easy for clients to interface with your system.**

Client-facing websites and portals are often the quickest and easiest ways for prospective clients to get in touch with a case manager or representative from your organization. Today, clients can receive assistance from nonprofit and government organizations through Virtual Case Management tools without having any physical interaction with you or the people you work with. Through portals and web pages, clients can submit data and a case management system will import that data to where staff members can securely access it on the back end. With just a few clicks and keyboard strokes, a client should be able to apply for or manage services your organization provides.

Accessibility is also an important factor to consider when looking into a client-friendly system. Clients need to be able to access your portal or website from anywhere and any device. Your system should also include various options for information input to accommodate all types of clients. Depending on what kind of organization you work for, your case management system may need to include the following features on client-facing aspects of your system: ***subtitled videos, audio guides, voice input, chat messaging, and more.***

Remember, a client-facing web portal may also be your clients' first impression of your organization. It's important that you present yourself to them for the first time in a way that makes them feel confident, important, and supported.

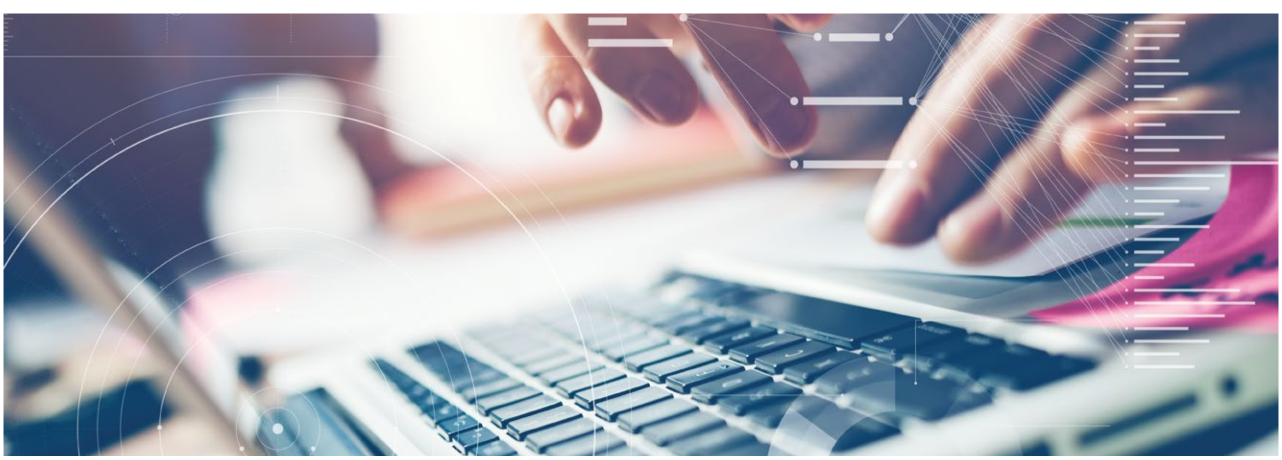


Clarity of Information & Duplication Prevention 03

Case management software should store and present data logically. It should also recognize and eliminate the duplication of data and services. This will help you more effectively manage your resources and not risk experiencing client data errors. For instance, if you have already worked with a client, their data should already be stored in your system without the need to input it again. Your system should also allow you to update that information for the benefit of the whole system without experiencing errors like client duplication or loss of client data. Having duplicate clients in your system can make managing their case more difficult, especially if different information exists for each contact.

“Information should synchronize throughout the system in order to make clients’ needs and the programs they’re under going clear and manageable.”

Case managers should be able to pull up a client’s information at any time and know it’s current and thorough. When your staff members update client information, add notes, or schedule appointments, those details should be evident to everyone who has access to that information. This will help cut down on wasted time trying to make sure client information is correct, lead to more accurate reporting, and help you understand your clients better.



Reporting

04

Nonprofit organizations acquire massive amounts of client and organizational data on a daily basis. That data can and should be leveraged appropriately through reports. A good report can showcase the outcomes of your organization's work to team members, donors, and leaders alike. Reports also highlight your organization's impact and give a clear picture of the current state of your programs, services, and measurable outcomes. That way, decisions can be made to facilitate the future influence of your organization.

When you research case management software, make sure the reporting features are robust enough to properly consolidate and present the information you've gathered. Reports should showcase an organization's impact in a way that's clear and digestible, even when there are massive amounts of data points to include. Find a solution that includes a variety of templates, and supports autofill or easy-fill options with simple importing and exporting features, and other similar features designed with efficiency in mind. Reporting software should make the process of generating these documents as easy as possible, and it should enable you to share them just as easily.

Some of the features important for a case management system's reporting tool include:

- Visual elements like graphs and charts
- Ability to import information from various sources
- Professional, clear presentation of all data
- Capability to export, share, and collaborate on reports
- Autofill or easy-fill functionality
- Rapid template selection and generation functionality

Some reporting templates that would be helpful for your organization to have access to include:

- Budget analysis that include explanations of how every dollar is sourced and used
- Client demographics
- Regular interval (e.g., monthly, quarterly, annually) intake numbers
- Program attendance and effectiveness
- Case manager and client feedback on programs and services
- Client actions over time and their outcomes
- Various forms of data highlights

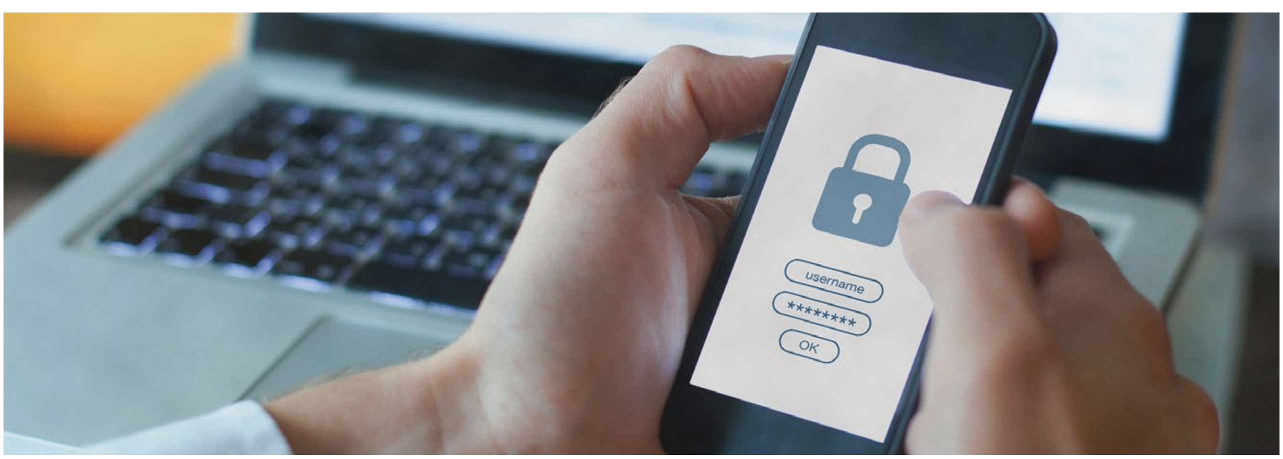
Security and Compliance Standards 05

Every piece of technology or software is vulnerable if it's not encrypted and monitored continuously. Security is especially important for nonprofits because of the amount of personal client information collected.

"Case management systems must have robust safety, security, and compliance standards in order to keep your work and your clients' data in the right hands."

The system you choose should include the ability to set predetermined rules for who gets to see what information and when. While data breaches can typically be prevented with stringent security measures, sometimes hackers or even users can create gaps in security. In the event of a data breach, a case management system should have failsafes in place to swiftly resolve any issues.

Security and compliance standards must comply with all government regulations, like HIPAA, and can accommodate even the most vulnerable clients. Your organization may also need to consider ways to integrate additional features to follow other partner organization's security standards. By choosing a software that prioritizes security, you can be certain that every service you're providing to your clients is compliant, and even more importantly, that your organization can be trusted with even the most sensitive information.



Onboarding and Data Migration

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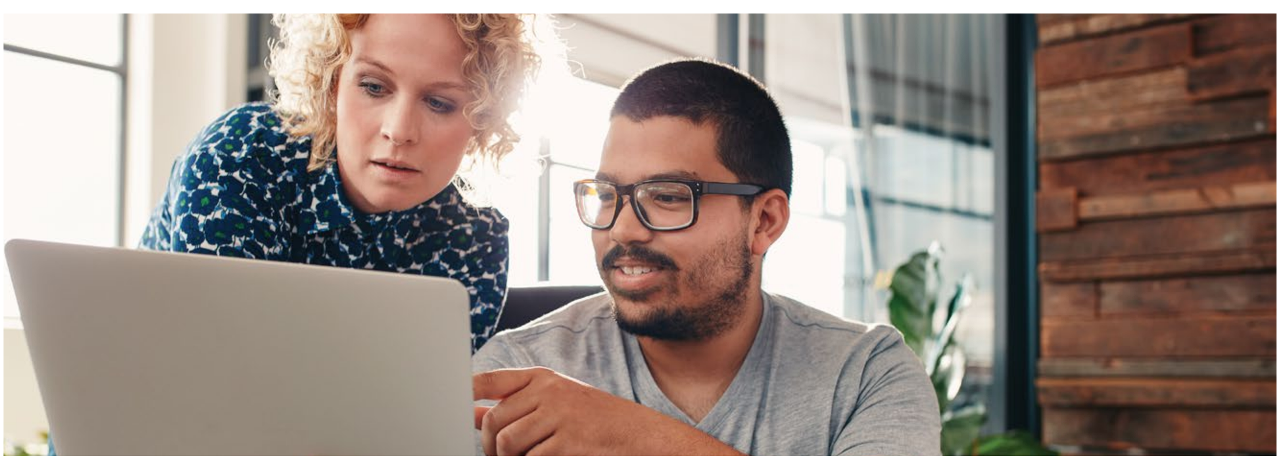
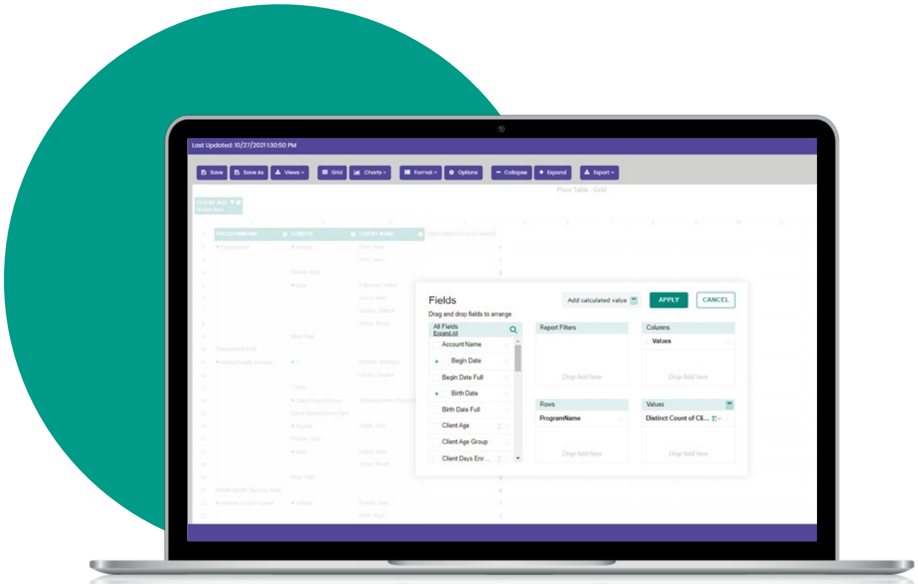
If your organization is transitioning from one system to another (or from a spreadsheet!), the switch should be as smooth as possible. When data fails to transfer, or data is otherwise lost in the migration process, your staff can end up with lots of extra work that could have been avoided. Not only could errors like these cost significant amounts of time and money, they could also endanger the safety of your clients. When searching for a new case management system, ensure that the software company and its administrators have a specific process to help the transition go as easily and error-free as possible. You'll want to make sure that your chosen software provider walks you through the process step by step and has a deep understanding of what you need from them.

A good onboarding and transitioning process should include:

- Close collaboration between your organization and your new case management software provider
- The provision of technical documents and plans to help the process move as effectively as possible
- Full access to the case management software company's network of support staff, who can answer any questions necessary and communicate with your team's system administrators whenever needed
- Set schedules, dates, times, and expectations for how the transition will progress so no one is surprised or left unaware
- Testing and retesting—a case management system provider should double check all functionality before officially making the transition, including the data migration setup itself





A dedicated account manager can help the onboarding and data migration process by providing individualized support that addresses your organization's specific questions and needs. The most successful data migrations lean on client involvement, but an account manager can help keep all parties on track. Your case management software provider should let you know what information must be passed along to ensure a smooth transition, and offer assistance as needed. Your vendor should be there every step of the way as you map out data, test the new solution, and perform other critical tasks.

Furthermore, any new case management system should come with a comprehensive training program that will familiarize your staff with new techniques and ways they can customize their workflows. While adjusting to a complex new system isn't necessarily avoidable, the impact can certainly be lessened so your team can get back to serving clients as soon as possible. Migrating data and getting used to a new workflow can be challenging, but it's in a case management software company's best interests to make it as easy as possible for your organization.

Efficiency

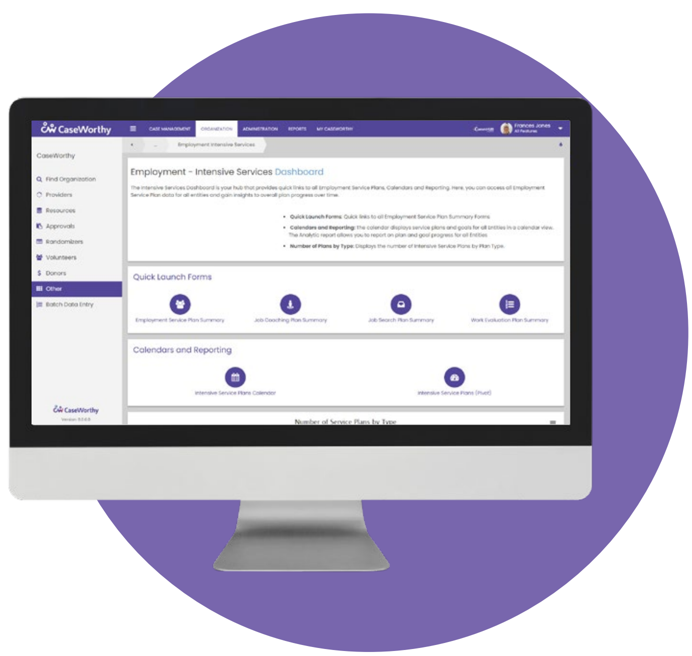
07

It’s important to choose a case management system that allows you to work as efficiently as possible in your daily tasks. Your software should work for you, not restrict you. Your team is inventive, and your projects shouldn’t be constrained by tools that can’t evolve with your workflows. Case management software should include certain features in order to ensure your team is able to work as efficiently as possible. These features should be configured around your programs, not preconfigured that forces you to adapt in ways that aren’t intuitive.

Choose a case management system that has efficiency features built in from day one, and you’re able to configure them as needed. **Some efficiency features to look for include:**

- Multitasking ability to go back and forth between tasks
- Smart automations for which you can set preferences
- Ability to get from one data set to another easily
- Ability to edit data and track changes on the fly
- Quick access to collaboration features like chat rooms
- Intuitive calendaring and scheduling features
- Data tracking by an individual or a household to save data entry
- Voice-to-text features, especially for recording and editing case notes
- Ability to turn on or off any feature as needed
- Virtual Case Management tools for video conferencing with clients
- Sharing data between programs so client data can be shared as needed across the organization

The end goal for any modern case management system should be to save you time and money while also helping your clients achieve the best outcomes possible. This can happen if the software you use is built specifically to improve your workflow in any way that you need.

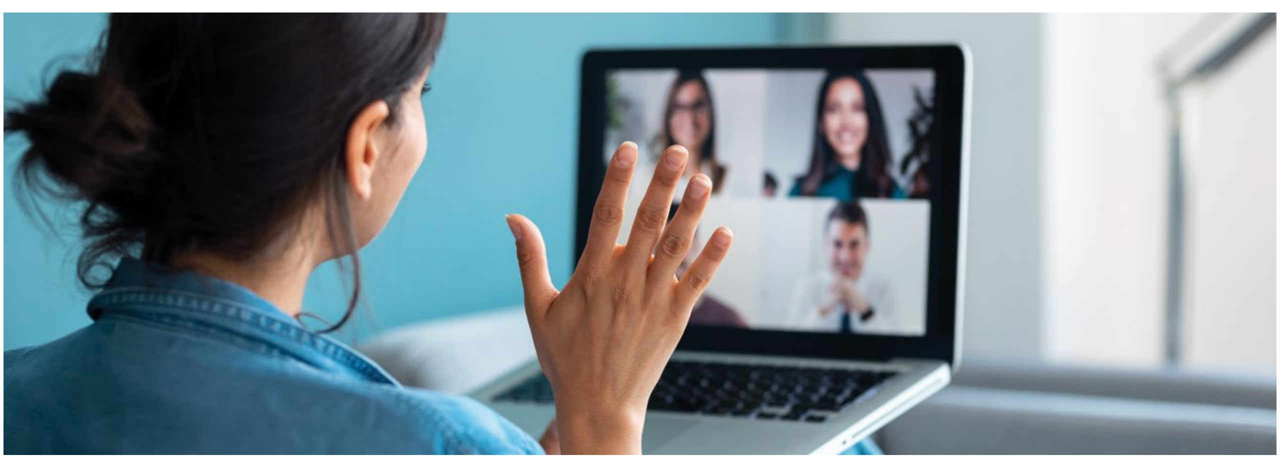


Communication 08

A case management system should be able to foster the necessary communication elements that help build relationships between staff members and clients. It should offer a comprehensive set of tools to help communication be as seamless as possible, especially in virtual and hybrid work environments.

Some of the primary communication options to look for include:

- Email creation complete with templates and signatures
- Chat room services with convenient features like multitasking, image/document attachment, and multiple user conversations
- Video conferencing to facilitate virtual case management work with both fellow staff members and clients
- Document sharing including Docusign integration, collaborating, and group editing
- Shareable case notes and memos
- Calendar and notification alerts
- Linkability between methods of communication (e.g.. text chat into video conferencing or email into calendar)



Assessments 09

In order to start assisting clients, case managers will typically need to administer a variety of assessments. Before an assessment can serve its purpose, you need to be sure clients can easily access and complete assessments.

“Digital intakes are becoming increasingly more common, and your case management system should provide both templated and customizable options.“

Nonprofits use the data garnered from these assessments to either automatically or manually match clients to services and programs, and even to potential jobs and community resources. These assessments should be comprehensive and allow you to see the big picture of a clients’ needs, while also helping you understand them better personally. It should also store a full history of completed assessments. Assessments can be completed upon intake but also at intervals along the individual’s plan and at exit. It’s important to have each of those stored so you can report on progress over time and from entry to exit. There will never be a substitute for getting to know a client personally, but a strong, intuitive assessment generated by your case management system's software can help you start a client relationship on the right foot.

Configurability

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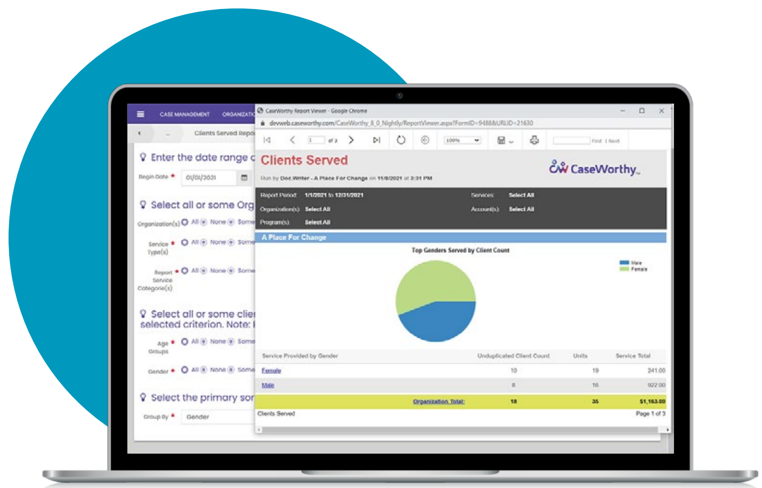
Finally, configurability is essential. While the other nine attributes laid out above are important to consider, a case management system should ultimately be configurable to fit your organization. Your organization and the people you serve are unique, and your case management system should follow suit. If a nonprofit organization doesn't use a case management system customized for specific use scenarios, the user experience can be like trying to fit a square peg into a round hole. Your staff will spend more time than they should have in order to make the system work for them, when what they really need is a custom solution that responds to their needs and can grow with them over time. Purchasing a case management system that's built for case managers can make a huge difference in the success of your nonprofit. Nonprofit and government case management tasks are unique, and the solution you select should accommodate your processes from the getgo with the ability to make adjustments that align with the way you work.

"A custom, configurable case management system will acknowledge your organization's unique needs and adjust to meet them."



It will include advanced features that allow them to achieve greater efficiency in their workflows. The key here is to also ensure that the system allows your organization to make the modifications yourself rather than going back to the software provider or a 3rd party every time you need something changed, added, or taken out. It should grow and flex with you. Some things may be difficult to figure out, but your system administrator should also be in full control of the configurability of the system without having to contact your software provider.

How CaseWorthy Stacks Up

Your organization may need all of these features, or it may only need a few. Nevertheless, it's good to keep all of them in mind when choosing a case management system and balancing cost with usefulness. For your convenience, we've created a quick checklist for you as you consider case management solutions—and we're proud to say we check every box.

At CaseWorthy, we make it our mission to help nonprofit organizations run as well as possible and help as many people as possible. Our team has extensive experience in the space, not just as a software provider. Many of our team members have direct experience working with or as case managers, and we are here to help you. We'd love to have the opportunity to learn more about your organization, and find out how we support your missions and goals.

Learn more at CaseWorthy.com
877.347.0877

Evaluating Case Management Systems Quick Rubric

- ☐ **Intuitive User Interface**
  - ☐ Utilizes AI/Algorithms
  - ☐ Easy to Navigate
  - ☐ Features Are Appropriately Located
- ☐ **Client-Friendly Features**
  - ☐ Accessible for Many Types of People
  - ☐ Visually Pleasing
  - ☐ Easy to Use
- ☐ **Reporting Features**
  - ☐ Custom Reports
  - ☐ Auto-Generated Reports
  - ☐ Templates
- ☐ **Security and Compliance Standards**
  - ☐ HIPAA
  - ☐ HUD
  - ☐ HMIS
- ☐ **Onboarding and Data Migration**
  - ☐ Custom Training Plan
  - ☐ Fail Safes in Place
  - ☐ Excellent Customer Support
- ☐ **Efficiency**
  - ☐ Automated Workflows
  - ☐ Multitasking
  - ☐ Easy to Access Anywhere
- ☐ **Communication**
  - ☐ Video Conferencing
  - ☐ Chats
  - ☐ Compliant
- ☐ **Assessments**
  - ☐ Templates
  - ☐ Custom Assessments
  - ☐ Auto-Sign
- ☐ **Clarity of Information and Duplication Prevention**
  - ☐ Contacts Update Universally
  - ☐ Real-Time Data Updates
  - ☐ Universal Data Storage
- ☐ **Configurability**
  - ☐ Flexible to Your Organization
  - ☐ Able to Tweak Independently
  - ☐ Access to New Features

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