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Visionlink Client & Case Manager

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Client & Case Manager

Welcome to the industry leading solution for client and case management, for both blue and gray-skies operations.

This core module offers two core configurations—for community services support and referrals, and for intake and case management for disaster relief and recovery.

Data formatting and validation tools make data quality truly possible, and our data exchange capacities let you to build a system of systems. Start large or small—and build as your mission and opportunities suggest.

Expert Design

The Client & Case Management core module benefits from millions of cases, thousands of users, and expert practitioners from hundreds of organizations.

The user experience is nearly effortless, consistent across the platform, and can be adjusted to match your needs.

Under the hood, the technology builds on the most recent advances: data entry is easy, the forms adjust dynamically, data quality is validated, and your information is safe.

The objective? To provide the most effective and efficient tools to help you support your clients.

One Agency or Many Partners

Work as a single agency or deploy client management tools for networks of collaborative partners.

Partner agencies can share everything or share nothing—or only certain fields.

Access can vary by program, by community need or disaster event, by staff group, by age—or by virtually any other criteria.

One or Many Events & Programs

Single events or multiple, simultaneous operations are supported—with one or many partners working privately or collaboratively.

Any scale, Anytime

The Client & Case Manager solution scales to any size operation and is deployed from Amazon Web Services.

Cost-Saving Standby Mode

Visionlink charges only for use—so if you have periods of less use, charges will decrease as well.

One License—Many Modules

Any user licensed on one Visionlink solution is licensed on all others at no additional cost.

This means you can integrate with other modules from Visionlink not pay more per user.

Prebuilt + Configurable

Visionlink's solutions are pre-built and ready to deploy—and they are also ready to be configured—so that every field and every page, role, and metric, can be configured to meet your specific operational workflows.

This means you can make this tech match your work, policies and business practices—and change it in real time as your needs change.

Simple Access

You need nothing but a cell phone or network access and a web browser. We take care of everything else.

Quick Training

Training takes only 30 minutes for most modules, and our help desk is truly friendly and supportive.

COVID-19 Ready

Visionlink's Community Operating System™ technology includes COVID symptom, status, and vaccination tracking solutions.

This means you can easily key information among prospective and active staff and volunteers, and the clients you serve.

Your work is important and necessary; with these COVID tools you can continue more safely.

Intake & Contact Types

Manage a wide range of intake modes such as in-person or through call centers. Or register the client in a shelter to begin a client record and then build on that information as it automatically transfers to client management.

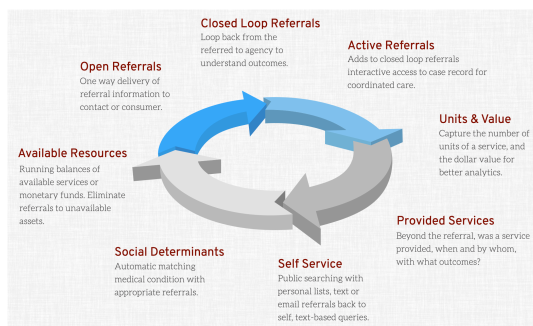
From Intake to Case Management

You decide which phases of intake and case management are appropriate to your operation. We can activate or de-activate the tools you need, and tailor each component to your operations.

We support completely anonymous short-term operations—and long-term, identified case management services which may continue for years.

Resources & Referrals

Client & Case Manager also integrates with our Community Services & Referral solution for open or closed loop referrals, access to an advanced directory of services, tracking of met and unmet needs, decrementing tracking of funds and assets and much more.

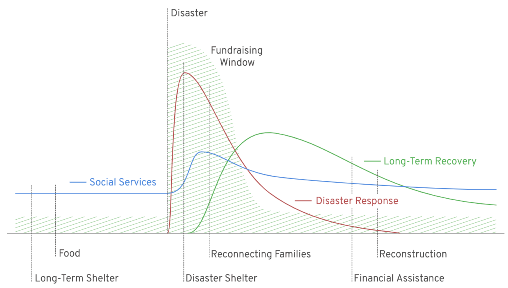


This includes automated messaging to those agencies to which you are referring clients for assistance.

Blue & Gray Skies

Client & Case Manager is explicitly designed to be used for either normal community services during blue skies, or for disaster operations, or for both.

Why? Because the systems used day-to-day are most effective during disasters, and every population you serve can be impacted by a disaster.



Enrollments & Assessments

An entire suite of enrollment and assessment tools is built-in, when and if you want to activate them.

ADRCs for example, can use caregiver assessments, Medicare screenings, safety screenings, counseling assessments and much more—all built in and ready to go (or to be refined as you need).

Disaster staff can capture information about levels of damage, recovery needs, application completions (such as for FEMA or small business assistance).

Youth engagement programs can capture information about risk factors and more.

HMIS screenings can be completed over the phone, or in person from mobile devices.

We continue to add assessments, and of course, with the administrative toolkit, you can build your own.

Powerful Queries

Finding client information in large data sets must be simple and accurate to drive call flows and workflows effectively.

Users want to be able to use many different kinds of fields for searches, such as status or eligibility, recovery need, care giver, case manager and so forth.

The good news is that any field can be used for search, and you can search by many fields at the same time. You can also build 'saved searches' and attach them to menus for quick, repeated use.

We also have special saved search tools for contact specialist and case manager staff where they can set up and 'play' back any saved search they use repeatedly.

Plus, you can deploy different search screens based on user role. Tools to help the elderly search for resources should be designed differently than for 2-1-1 contact specialists, as an example.

Similarly, disaster case manager supervisors need searching tools and results tailored to their work.

These tools can be as detailed as you wish. Include zip code, city, county, insurance type, age, location, veteran status and military branch; any standard field, any custom field—any collection of fields can be used to search for data.

And the results include a "quick filter" on the results screen, so the returned results can be narrowed down even further, instantly. The columns sort and paginate automatically.

Household Management

Capture information with separate records for each client or use one of our household tools.

Clients can be part of one or more households and removed from those households no longer applicable.

Track only the number of people in the household or add demographics and other detailed information by household member.

Contact Dispositions

Track call dispositions, and the reasons for initial contact, follow up dates and more for satisfaction or quality surveys.

All of these details may be deployed for different staff groups, different departments and different partners and programs.

For some, track disposition, for others track follow up dates, for others, keep the information entirely anonymous.

Schedule Follow Ups

Enter dates for follow ups, and then save that follow-up information to the contact record directly, for single record, unified management and reporting.

Addressing Tools

Type the beginning of the address and the system will return a series of matches so you can select, rather than type out the full address.

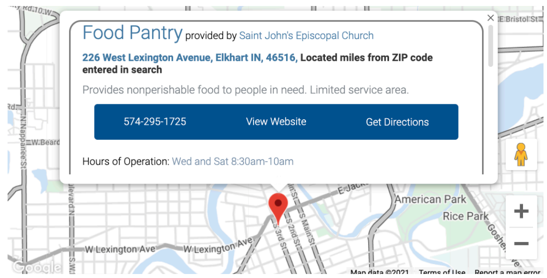
Validate the address—or, override that address when necessary.

Split Jurisdictions

We have built in the boundaries of every zip code, city and county in the nation—with split jurisdictions as well, so you can be very specific about a client's location for eligibilities and services.

Mapping

Turn on map displays to see where a client is located or the same for critical community services, impact areas and more.



GIS coordinates are also ready for export and for use in APIs to support stewardship reporting or advocacy for additional resources.

And since privacy is so important to the communities you serve, there is an option to blur locations if anonymity is important.

Blended Options

Since the platform is flexible you don't have to pick a single approach—your solution can feature a blended model to start with an anonymous record, use identified records for other programs, and link to our case management solution for long-term coordinated care.

Staff Assignments

We offer easy options to determine the best staff member to handle a particular client or assessment, or reassign it to other staff member, or engage other agencies and coordinate case managers among all your partners.

See on-screen who is assigned to a client as well as the agency name and contact information.

Role-Driven Access

Which fields and forms can be seen by whom is easily controlled by linking a form or field to a permission, and then giving that role to a user. By doing so, your staff will only see the menus, forms, and fields they are allowed to see.

This works for multi-agency partnerships as well. Control who has access to which records, fields, searches, and so forth.

Required & Default Fields

The many field types we use include options such as "required" of course, but we go further to include "required on entry," "read only after first use," default and initial values and more, to support sophisticated workflows.

Simplified Data Quality

Our data formatting and validation tools improve data quality. Take advantage of type ahead fields, single and multi-select option lists, and auto-address lookups to reduce training needs and increase data quality.

With an integrated telephony system, reports can be created to show call record data by user, for non-duplicated and more efficient reporting.

Dynamic Data Capture

We deploy dynamic entry forms that instantly change information as it is entered about each contact, client or case.

- If female, ask if pregnant;
- If suicidal, display crisis intervention;
- If damage is partial, ask about relevant recovery needs.
- If they have not applied for FEMA assistance, pop up the application information.

Like everything else, these are driven with customer-facing wizards so you can create your own dynamic scripts, or change our existing ones, to fit your needs. No programing required. Think of the time and cost savings.

Data Duplication Prevention

Because Visionlink systems are often connected to other systems, after-the-fact data de-duplication is too late.

So, we use address checks for duplications and search before entry tools. This can work with telephony integrations as well, where incoming calls let you connect with prior records, or new records as you deem appropriate.

If duplications do occur, use our bulk update tools to add, delete, combine or edit any duplicate records.

We also deploy cross-system duplication checking between two different systems in real-time—another first for this marketplace.

Multi-Lingual & Localized

Any form—one of our templates or one that you create yourself—can be deployed in up to 100 languages through browser-based translation tools.

For more critical environments, where phrases or concepts in the same or different languages should be stated differently and accurately, our Language

& Localization Module lets you quickly define translations for every field and form.

The Localization module also includes the keenly useful ability to return specific information from multi-select option lists in English, for single language reporting (even when captured in other languages.)

Mobile Responsive

All of this works on smart phones and tablets using the world's leading mobile-first framework without any special apps or browser add-ons.

You can make your own mobile apps as well, in minutes.

Integration Options

Visionlink's Community Operating System™ is built from the ground up for integrations.

This includes prebuilt **telephony, text, email** and other similar connections. And our API Builder tools make new integrations much easier and less costly to complete.

We partner with Sterling Volunteers to provide three different levels of **background checks**, and with other partners for **identity checks** for financial assistance.

We connect with credit card processors, PayPal, banks and others for **financial assistance t**ransactions.

Connect this Client & Case Manager solution with Visionlink's **Shelter System** Manager to link initial intake with shelter registration.

Connect this solution with Visionlink's **Grants Manager** so that you can track client impact for your grant funded programs.

A seamless connection is also available between this module and our **Repair & Construction Manager** so that rebuilding operations can be linked to client records for coordinated assistance.

Or, connect with Visionlink's In-Kind Goods & Services Donation solution so that client needs can drive **donation requests**.

Browser Neutral

We support current versions of all major browsers and recommend Chrome and Firefox for their adherence to Web and mobile standards.

We also support saved entries, spellcheck, and multi-lingual data entry with these leading browsers.

Standards

Client & Case Manager can support AIRS, FERPA, HIPAA, PCI, PII, SAML, SOC2, .Gov, JSON RESTful standards, and others. Let us know what you need.

Data Exchange

Client & Case Manager is the most advanced data sharing solution in this market.

Visionlink's proprietary API Builder, makes it quick and easy to deploy endpoints to move data to and from other systems.

And of course, if some other partner cannot support APIs, the solution builds import and export spreadsheets, and bulk update sheets, with a click from any collection of fields.

The result? You can consume or generate client data to and from other data providers as you wish at tremendous cost savings.

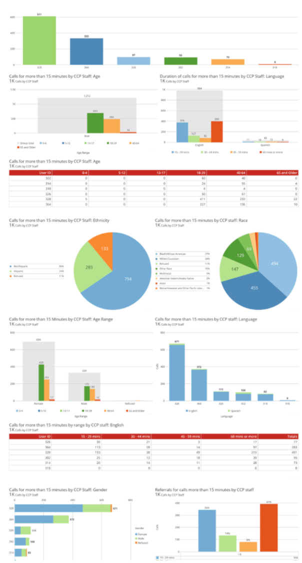
Not only can you build a network of partners on the Visionlink platform, you can also connect with other external systems.

Operational Reporting

Gaining visibility into the trends, challenges, and resources related to sheltering is critical.

All of our tools are built from the ground up with three simple concepts: 1) data should be validated upon entry; 2) it should be just as easy to get data out as it is to get data in; and 3) data structures should be industry-compliant for both .CSV and API-based data exchange.

We offer our new on-platform, real-time reporting solutions, ResultsOS, and our partnership with Domo business intelligence. Ask for more information about both.



And of course, with our API Builder and our export builders, you can use all of your data with your own reporting solution should that be more useful.

Audit Trail and Interactions

Every contact (interaction) with every client, case or household is tracked, and you can see every change to the record for every interaction.

Plus, audit trails log every activity system wide, in case you need to do an investigation, for example, and need detailed system logs from our staff.

Security and Backup

We provide separate documentation explaining our security and data safety operations.

Briefly, your data is secured at or beyond commercial standards, is compliant with a wide range of security standards, is monitored around the clock by our full time IT and security staff, is redundantly maintained, and is further protected by reviews from our third-party auditors.

You can expect system uptime at 99.99% or better.

Support and Training

We provide complete support with in-person training, documents and videos.

Our help desk team is responsive, knowledgeable, and friendly — and they actually return your calls and emails.

Our leadership team has exceptional, in-depth experience in disaster relief operations—having been engaged in nearly 300 named disasters—so we can provide implementation support as well.

Similarly, our Community Services staff has operated programs at the local, state, and national levels, holds every AIRS certification, and has built a wealth of proven solutions across the nation.

We can review your operational readiness plans, provide implementation support, capacity planning and scenario simulations to better ensure your success.

Make It Your Own

While we deploy pre-built and expertly crafted solutions, every field, tab, form, role and permission, page and menu, search and search result, CSV export and API endpoint—and so much more, can be configured by you and your staff, or by our solutions team in consultation with you and your colleagues.

The objective is to provide a solution that works well now, and which can adapt to new opportunities and challenges as they arise in the future including ever-changing contracts and regulations that impact your work.

Pricing Model

Visionlink's Community Operating System is designed to maximize your investment over the long-term, and to minimize day-to-day operational costs.

The launch charge covers configuration, launch, training, and basic support services.

Other charges are few and simple. We charge by the number of users active on the system per month, the amount of data you may be moving between systems with our data exchange tools, and for senior domain implementation support and assistance.

One License—Many Modules.
Importantly, we do not charge additional user fees for each module.

We do not charge for clients or households and there is no limit on the number of records.

Help Desk support is included in our monthly user fees.

All security and data integrity services are included.

We do not charge for data storage, number of records, triggers, fields or forms.

For More Information

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We look forward to supporting you and your colleagues!

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