# Virtual Case Manager

Virtual Case Manager (VCM) is an integrated web-based system developed to collect, track, measure, and manage the details about client information and their service needs.   Built on a centralized database and utilizing a common information platform, the VCM consolidates client information and record keeping into a uniform, confidential and collaborative system within your agency and throughout the network.

## Collect • Track • Measure • Report • Collaborate

## Agencies

Single point client intake, record keeping, and service tracking

Reduces intake time and duplication while streamlining client processing

Consolidates multiple forms of communication into one organized and centralized resource

Real-time service reporting

Geographical snapshots of service needs, frequency, and volume

A simple resource for agencies to provide general referral services

Secured record keeping, HIPAA compliant, and ensures internal / inter-agency level control

## Client

Reduces wait times

Hassel-free client intake within the network of providers

Reduces the number of times personal information is requested

Free access to health and social service directory

## Reports

Meets OJFS, United Way, and other funding sources reporting requirements

Standardized, specialized, and aggregate data reporting  and exporting

**Affordable Solutions**

No upfront cost

No large investment

No expensive software

Free online training

Easy setup - 1 hour

All for a small monthly user fee

To find out more about the VCM's affordable services, schedule a free demonstration, or consult a specialist, please contact us today.

Contact us at:  513-826-4364
sales@virtualcasemanager.com

# Virtual Case Manager

**VCM**

## Food Provider Benefits

The Virtual Case Manager provides a multi service record keeping system for families, service needs, and referrals. It allows pantries to track the demographic information and the number of services being provided. This allows for real time reporting on the needs in the community. How many people need services, what are the services in need, and what are the average demographics of the people needing services today? Trends can be watched to predict future needs.

The VCM provides member Agencies with the complete details of the services they have provided and to whom. Reporting provides real time statistics for funding sources and grant applications.

The VCM is designed to manage the needs of:

- Pantries providing services of any type, food, clothing, basic needs, referral assistance
- Food Banks collecting funding and reporting information on services provided in their network
- Digital record keeping and electronic signature for OJFS Food Take Home Eligibility forms
- State wide reporting for USDA and other federal or private grant and funding requirements
- Ohio Benefit Bank program integration and assisting with referrals
- Backpack Program providing required tracking for reimbursement and reporting
- SNAP Program proving required tracking for funding and reporting
- Kids Cafe Program providing required tracking for funding and reporting
- Provides each Agency with a simple and effective referral system for Clients that have additional needs
- Provides a public directory for anyone to find services available in their community (connectyou.org)

The VCM ID service card allows for Clients in need to quickly receive services from a provider. The VCM provides each service provider with the details and identification of the Client in need. Services can be quickly recorded, put on a wait list, or referred out to another Agency who can help. Notes, files, photos, and scanned images can be recorded and maintained with the Clients information.

The ability to track services and provide required reporting is only one benefit to service providers. The larger benefit of a program like the VCM is the ability to collaborate on Client needs. This happens with communication of needs and referral assistance where the needs are directly submitted and maintained around the Clients records. Information can be shared with a referral to assist the agency providing services for the Client.

The Virtual Case Manager will evolve as member agencies communicate their needs with us. We work to provide the technology to allow providers to serve their communities effectively and in a collaborating manor with their community of providers.

# Virtual Case Manager

## Communication

The Virtual Case Manager brings multiple forms of communication together and ties it to the client or case work.

Traditionally agencies are communicating in five different mediums.

- Face to face
- Over the phone
- Faxing documentation
- Mailing information
- Emailing each other

The VCM organizes this information into one structured and secure location to be shared internally within an agency or between agencies collaborating on client needs.

Document management is only one piece of the records management needs of most agencies.  Digital files, case notes, images, service records, electronic signature, and client demographics are all built around the client and family.  This same information is available for future use or can be shared with collaborating or contracted case workers with the click of a button.

This is equally beneficial for the client as his or her information can travel with them to other agencies eliminating the redundancy in providing details and records when applying for services.

The VCM provides a structured and efficient medium of communication while securing and archiving documents for the life of an agency's requirements.
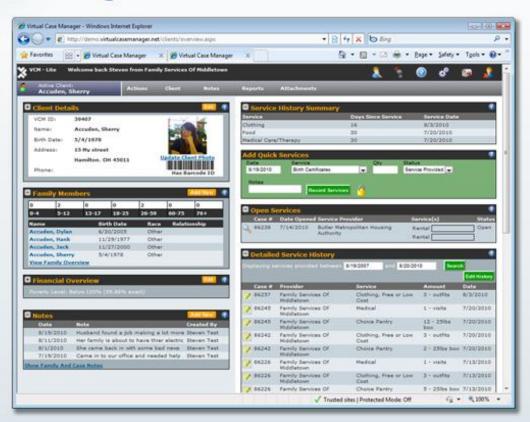
# Virtual Case Manager

## Family Overview



The family overview page provides a comprehensive view of a client's demographic information, current financial status and history of services provided. From this screen agencies can quickly record services provided, view what services the client has previously received, and enter and review case notes.

Additionally there are summary notices of the last time the client was served within the VCM network with services that your agency provides. This is intended to prevent abuse within the service network and allow agencies to serve the families who have not received recent assistance before those that have.

The family overview provides quick navigation to family member details, case notes, reports, and accumulated digital attachments like; birth certificates, tax records, intake forms, e-signature forms, and any other information collected and shared between collaborating agencies.

All client information is recorded with the security policy consisting of three levels:
- Private only to your agency
- Public to all registered agencies within the VCM
- Shared with collaborating agency groups that are built and controlled by your administrators

# Virtual Case Manager

## Refer Clients For Service



The VCM's referral features allows each agency to have access to a comprehensive directory of providers in your community or throughout the network. With this simple to use resource staff and even volunteers can quickly search for agencies who can meet the needs communicated by the client. It's as simple as typing in a description of needs like; food, clothing, shelter, transportation, counseling, or by using the taxonomy built into the system for related needs. The VCM looks at all available resources from each provider in the system and returns a simple list based on the needs specified. The matching list of support providers is returned in the order of proximity from the clients address or from your agencies address, listing the closest provider to the Client who can meet their needs. For active agencies utilizing the VCM for their internal case and work management, wait times and availability of resources is also provided enabling staff to choose the agencies who can help meet needs today.

When a referral is made the details about the client and their needs are automatically sent to the referred agency. The Client also receives a print out of the details they need to receive support. The referral slip includes directions, contact information, hours of operation, services provided by the agency, restrictions of services, fees, as well as any documentation provided by the agency under their profile. Additional documentation can include critical details to assist the client prior to their visit. Details like qualifications for service, criteria for enrollment, or even intake documentation that can be filled out prior to a visit eliminating wasted time in waiting rooms or redundant visits when clients are unaware of the items they need to bring with them.

With these simple to use resources, the Virtual Case Manager is building a community of providers who can extend their ability to serve and support far beyond their agency's walls.

# Virtual Case Manager

## Contracted Client Referrals



Contracted services are designed for agencies who outsource support from secondary agencies on behalf of a client's needs. This system allows the source agency to monitor the progress of the work from start to completion providing real time status of the contract and its fulfillment.

Contracted services are very similar to referrals within the VCM. Here are the primary differences between the two types of case needs:

### Standard Referral
Needs are a general request of help
Can be private once accepted by supporting agency
When completed referrals are closed out
Meant to initiate needs that are handed off
Allows internal case assignment once accepted
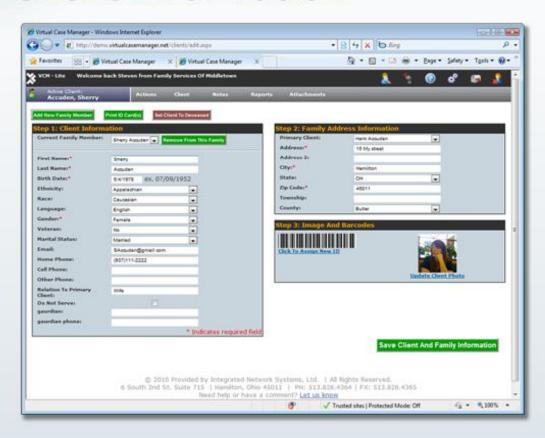Details remain under the client overview individually

### Contracted Referral
Defines exact service needs and amounts
Mediates communication throughout the contract between agencies
When completed, post service survey sent (optional)
Holds agencies accountable to the contract definitions
Allows internal case assignment and management oversight
Provides agencies and staff a dashboard of current cases

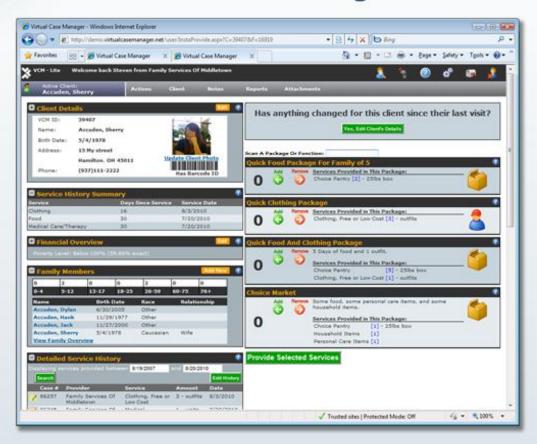# Virtual Case Manager

## Client Information



The client intake screen provides staff with a tool to enter and modify general client and family demographic information. On this screen the user can record client details as well as assign a VCM ID card and capture a photo ID snapshot.

One of the key features within VCM is the duplication verification process. If the system matches an existing user in the network with the new record being added by the user, staff will receive a list of the possible matches that already existing in the system. This feature serves two purposes: maintaining proper data integrity and assisting in data entry. If the client is already in the system, there is no need for the user to re-enter all of the client's information.

The Virtual Case manager also provides agencies the ability to add custom client fields that can record and be reported on within the VCM. These fields allow for agency to customize their tracking needs without custom developed modules.
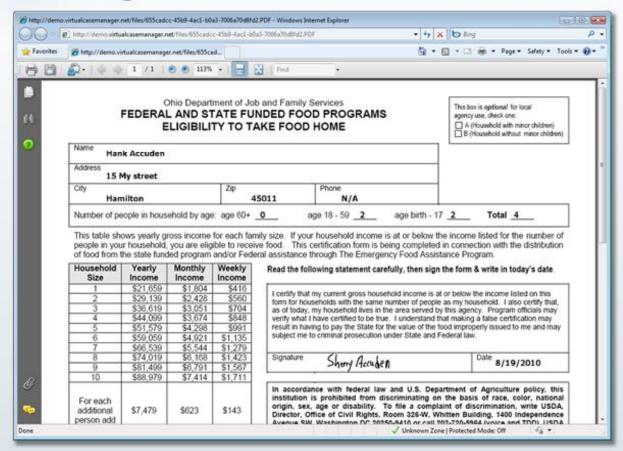
# Virtual Case Manager

## Quick Service Entry



The quick service entry resource provides a fast and easy way to record one or more services in a single click of the mouse or scan of the hand scanner bar code system. This process can be completed using the keyboard and mouse or with the help of a barcode scanner and/or e-signature signoff pad.

The process has been designed to be as simple and robust as possible and to streamline data entry for high traffic locations or for volunteer and beginner users of the VCM. Service packages, e-documents, and the screens visible modules can be configured at an agency level allowing each agency to tune this process to fit their individual needs.

The flow of the intake process is also customizable. In this example and depending on which services are provided to the client or family, the system will take the user through signoff verification steps in which the client signs off on required documentation like the OJFS Eligibility Food Take Home Form using the digital signature pad. No paperwork to collect, maintain, or manage. Auditing can be done electronically or records can be printed for reporting requirements at any time.

# Virtual Case Manager
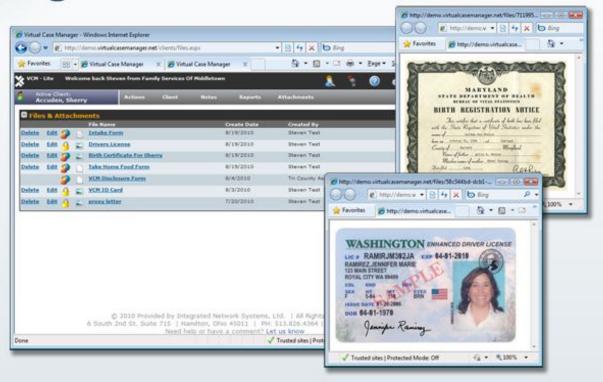
## E-Signature Documents



The e-signature pad can automatically populate any paper form or PDF document with the client's information and their digital signature. In this case, the form is used multiple times for the same client and each new visit adds one more signature to the PDF. These documents are attached to the client's record and be pulled up at any time from the client's attachments screen.

System processing can be implemented to automate required changes of form population, information from the client's records, changes in the family makeup, or for changing agency requirements.

Triggers can be set on the service to required signoff as services are recorded within the system. Staff will be prompted when certain services are recorded that require signoff from the client.

# Virtual Case Manager

## Digital File Attachments



Digital file attachments allow agencies to associate digital scanned images, high resolution webcam photos, and local computer or network shared files with the client's records. This allows for any type of information to be encoded from one of these formats and associated with the client.

This provides agency wide organization of information as well as the sharing of this information with collaborating groups of agencies who will need this same information to provide services for the client.
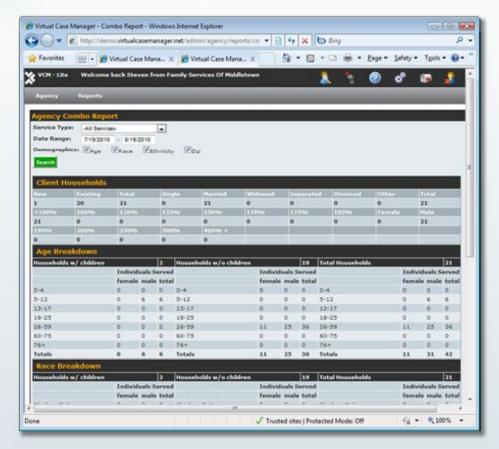
The VCM provides a common intake and record keeping system to be used privately or within a group of agencies who are working together to assist the client's needs.

The VCM provides agencies with a cost effective and well organized document management system. Additionally the VCM network allows this same information to travel with the client as they receive services throughout the community of providers.

All attachments adhere to the VCM security schema controlled by the agency recording information within the client's profile. Information can be completely private, public, or shared within groups of collaborating agencies, always controlled by your agency administrators.

# Virtual Case Manager

## Combo Report

The "Combo Report" gives a breakdown of individuals serviced for a given date range. The information here is broken down by various demographic values including age, race, and poverty level.
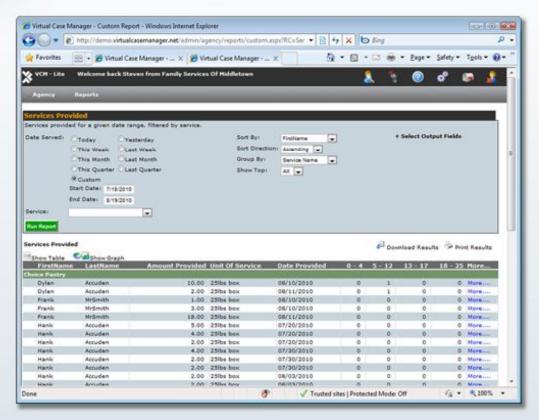
From the information collected about the family, members in the family, income, expenses, employment history, and general demographics, the VCM can provide statistics and patterns on the needs in each community. This allows providers to better understand the needs today and in the future.

These resources are also used to assist programs that are proactive in targeting families to provide preventative measures or education to address issues prior to the need for further public assistance down the road.

Many agencies are responsible for reporting to their funding sources on a periodic basis. Many times the information required is pieced together from data collected in multiple programs or built off estimations of service. The VCM eliminates the time needed to produce these reporting requirements as well as provides real time statistics on the service needs in the community.
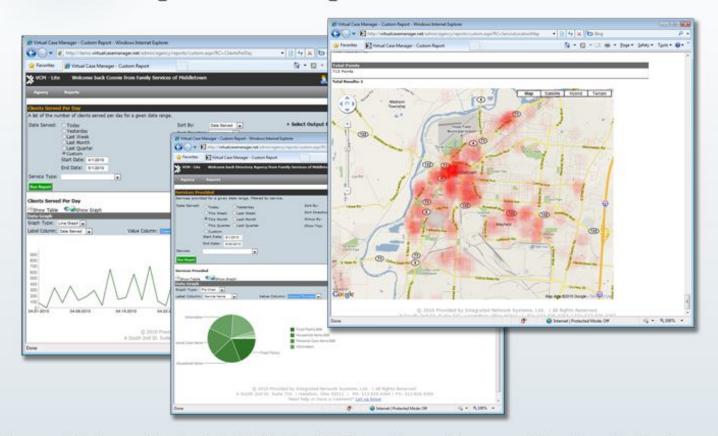
# Virtual Case Manager

## Service Report



The reporting tools built into the VCM provides a wide range of functionality. Each report is given a set of available filters that may be used as needed to retrieve the desired data. Once the data has been retrieved, users can sort, group, and download the report. Accumulative reporting is available for agencies that are looking for agency wide statistics, information and patterns on county or state wide activity.

Reporting allows an agency to see and understand more then just service history or a list of clients served. The system provides information like; averages in ages, race, income levels, employment, and general demographics. It allows agencies to see patterns of service needs among multiple agencies and the frequency of those needs. This can predict the move towards or away from further assistance, allowing agencies to reach individuals or families before issue become insurmountable and assist them with programs to change the direction they are headed in.

# Virtual Case Manager

## Graphical Report



The graphical reporting tools built into the VCM provide a wide range of functionality. Each report is given a set of available filters to be used as needed to retrieve the desired data and statistics. Once the report criteria have been entered, users are presented with visual information allowing decision makers to review the gaps in service, changes in volumes of services over time, and determine where in the community needs are most prevalent.

One of the challenges in decision making is to have the resources and information available in a format that can be easily interpreted and is manageable. Graphical reporting enables large amounts of data to be presented in a simple yet powerful format that can provide volumes of information in a snapshot. Utilizing line graphs and doing month to month overlays provides simple feedback to the changes in needs over time. The concentration maps show the needs of any service or groups of services over a give time, where they exist in the community and how great the concentration is. Comparing locations for existing support with the locations of needs provides an easy analysis for administrators to see where gaps exist.
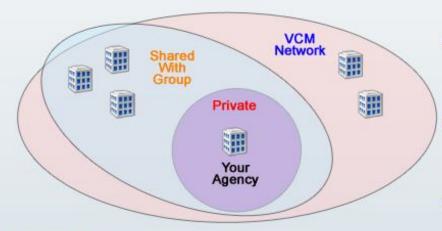
Custom development also allows for conduits to be built between applications allowing for data imports or exports on a real time or scheduled basis. This allows for the VCM to integrate into existing system that may already be in use within an agency.

# Virtual Case Manager

## System Security

The Virtual Case Manager has been built from the ground up with security in mind. We understand that each agency has their internal policies for sharing information. With this thought in mind we have developed a three level system that provides for all types of security and information exchange needs.

The VCM's 3 level security schema is represented in the image below.



**Private**
Data records are completely private within your organization. User level control can hide details from internal staff only needing partial client information to process services or refer for assistance.

**Shared within a Group**
Agencies can configure collaborating groups of Agencies to share information between. The Agency creator controls the sharing of information and can revoke access at any time.

**VCM Network**
Registered Staff with VCM access may view shared information.

## Security Overview

- Highly secure file management and record keeping system.

- Customizable security controls limits user's visibility to details and access to menus and features.

- All features require a login and only provided to registered users of the VCM.

- Automated auditing services provide constant monitoring of user activity throughout the system.

- Administrators may revoke visibility privileges between Agencies or internally at any time.

- Access to your data at anytime via our reporting tool.

- All recorded data is the property of the Agencies entering the information.

- Administrators may lock service level visibility so users do not have the option to change it.

- Modern intrusion detection and prevention systems to ensure your data is always protected.

- Daily backups and server maintenance to ensure data integrity.

- Client waver signoff to track information within VCM

- Agency & staff signoff on policy & accountability disclaimer

# Virtual Case Manager

## Application Data Security

Application security is of the highest important for the VCM development team. We understand that your information is confidential and keeping it secure and providing fault tolerance is a must. Here are a few of the technologies we have implemented to ensure that your data stays secure.

### Application and Security Features:

**Security Socket Layer (SSL).** The SSL technologies provide encryption on all communication between the end users computer and our server center. It also ensures to the end user that they are communicating all information with our system and validates the source of connection to the VCM network. This ensures that communication cannot be captured by outside parties.

**.NET Framework** - By default the Microsoft.NET framework provides many layers of protection from existing intrusion methods like scripting attacks, request manipulation, and query string hijacking. The VCM was built on top of the most up to date programming and security technologies available today. These same technologies are used in banking, government, and healthcare systems.

**Brute-force Password Protection** - To prevent outside parties from guessing a users account and gaining access by authentication, the VCM password criteria requires strong password structure required in all secure network environments. The system continuously audits logon attempts and if a user's access credentials fail more than a few times the system temporarily disables the account to prevent further attempts for a period of time. If the system sees continued failed attempts the system will block the originators IP address blocking all access to the VCM and immediately alerts our support staff.

**Firewall and Data Access** - The VCM SQL servers reside behind a non accessible firewall system. The software and application layers analyze and process all information to and from the databases to ensure any access is from authorized sources from authenticated users of the VCM.

**Single Location User Account Access** - Every registered user of the VCM has his or her own credentials enabling extensive auditing of the activities within the VCM. If a given account is accessed simultaneously from two different locations the original logged in session is terminated to prevent open connection to the VCM in and idled status. Additionally all accounts are logged off after a timeout period to ensure access is not left unattended.

**File Attachment Abstraction** - All images and digital documentation recorded within the VCM is handled and stored by the File Abstraction Layer. This enables the system to first authenticate and review security rights before retrieving and displaying files. The physical data storage of these documents and images are outside the access of any other sources other than the abstraction layer.

**Data Integrity and Redundancy** - Our hosting facility has implemented many levels of redundancy to protect the systems involved including; daily backups and offsite replication, redundant fiber connections with automatic failover, UPS and generator backup systems, dual climate control, access control, video surveillance, and many more measures of redundancy and security. Our disaster recovery schema and failover scenarios are continually analyzed and updated to ensure availability of the VCM network and access to your information.

# Virtual Case Manager

## System Requirements



The following hardware has been tested and approved for use with the Virtual Case Manager running on computer systems that meet the following requirements. Older computers may run the Virtual Case Manager system and the peripherals but may experience slowness in usage.

**Recommended Computer Specifications:**
- Windows XP / Vista / Windows 7
- 2.0 GHz processor or better
- 1 GB of memory
- 3 USB ports for webcam, barcode scanner, e-signature pad (USB expansion ports available)
- Monitor resolution of 1024x768 or higher
- Internet explorer 7.0 or newer, Firefox, Mozilla

**Minimum Computer Requirements:**
- Windows 98 or newer
- Pentium 4 or greater
- 256 MB Ram or greater
- 1 USB ports for webcam (USB expansion ports available)
- Monitor with 800x600 resolution or higher
- Internet explorer 6.0 or newer, Firefox, Mozilla

**Internet Connection Specifications:**
- High speed internet connection recommended (DSL, Cable, T1, ISDN, Fiber, etc)
- Minimum dialup connectivity 56Kbps

# Virtual Case Manager

## Peripheral Cost

## Approved For VCM Use

### Topaz E-Signature Pad

| | |
|---|---|
| Manufacturer | Topaz Systems |
| Name | SignatureGem LCD 1x5 |
| Cost | **$369.95** |
| Description | Includes all the high-quality capture features of a Topaz electronic signature pad with the added feature of an LCD interactive display, allowing users to see "electronic ink" under the pen tip as they sign. The electronic signature capture authentication positively identifies the signer based on biometric data, virtually eliminating the chance of fraud or forgery. |

### Web Cam

| | |
|---|---|
| Manufacturer | IPEVO |
| Name | Point 2 View |
| Cost | **$83.00** |
| Description | A 2 megapixel web cam with 1600x1200 photo resolution. Perfect for taking client photos and imaging small documents like drivers licenses. |

### Barcode Scanner

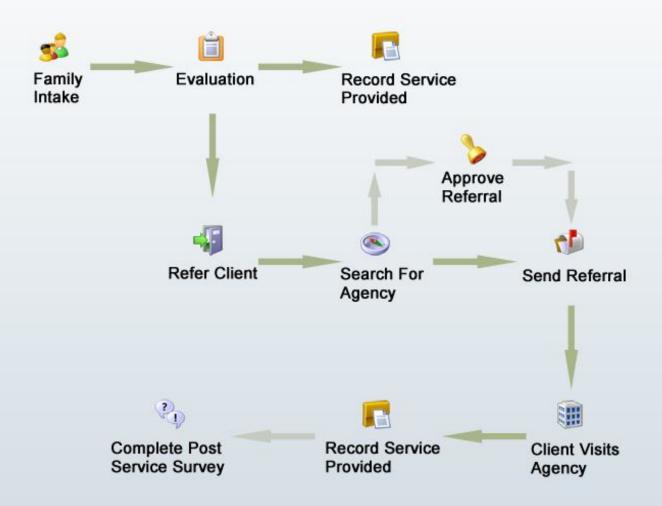| | |
|---|---|
| Manufacturer | Metrologic |
| Name | MS 9540 Voyager |
| Cost | **$159.99** |
| Description | Laser based barcode scanner capable of scanner a wide variety of barcodes at a range of 1 to 12 inches. This scanner can automatically sense and scan a barcode held within it's scanning range, or can be manually activated for more scanning control. |

### VCM ID Cards (Purchased From VCM Directly – 513.826.4364 )

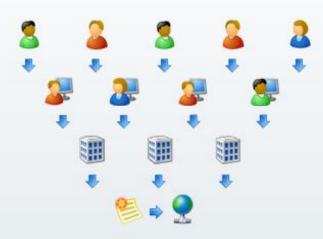| | |
|---|---|
| Name | VCM ID Cards |
| Cost | **~$0.18 per card** |
| Description | VCM ID cards are generic, pre printed cards used with the barcode scanner. These cards are purchased in large quantities and may be customized with your logos. |

# Virtual Case Manager

## Client Services Workflow

Family Intake → Evaluation → Record Service Provided

Evaluation → Refer Client → Search For Agency → Approve Referral → Send Referral

Send Referral → Client Visits Agency → Record Service Provided → Complete Post Service Survey

# Virtual Case Manager

## Support Hierarchy



Standard Users

Local Agency Admins

Food Bank and Vista Admins

VCM Support Group

Our support hierarchy is set up to provide the best possible technical support while maintaining low cost. At any point in this process users may contact VCM support directly, but it is recommended that users follow this escalation process:

**Support Tier 1**
VCM user consults online documentation and videos for support

**Support Tier 2**
Agency administrator is notified of the issue and attempts to resolve

**Support Tier 3**
User or agency administrator contacts trained support staff at local food bank or Vista Admins

**Support Tier 4**
Issue is communicated to VCM support staff using our online ticketing system or by phone

Our online ticketing system should be used when communicating issues regarding Virtual Case Manager. This allows us to keep track of all issues and properly manage communication with the end user. It also shows of trends of common issues so we can proactively address future problems.

# Virtual Case Manager

VCM

# ConnectYou.org

## United Way

- Assist agencies with a free and effective referral resource
- Track and Report on the needs in a given community
- See concentration maps of individuals who are in need
- Shows service needs that are not being provided in a community or marketed properly
- Expands the reach and compliments the 211 program
- Extends the resources of printed material that can become outdated shortly after printing

## Agencies

- Provides a community resource directory of all agencies and services providers
- Enables the agencies to reach the community in a cost effective way
- Allows agencies to provide referrals for the clients they serve
- Provides detailed reporting on their activity in the "connectyou.org" directory
- Helps defines their market reach
- Provides the ability to manage their information and keep it updated
- Provides a low cost marketing opportunity
- Can add valuable resources by embedding the directory into their own website
- Gain benefits for search engine optimization and back linking function

## Clients

- Simple resource to find closest service provider
- List of complete agency details; hours of service, restrictions, services and printable intake information
- Provides a holistic resource of all supporting agencies, what services are available and where there located
- Allows for anonymous access to search for assistance before providing any information
- Easy to use, always available and more accessible than printed materials

## Connectyou.org services

- Free public resources for the community and agencies
- Provides an easy tool to find service providers based on a list of services or open word search
- Provides details on all service providers including map overlay of their location
- Allows for documentation to be available upon arrival for clients, like pre-completed intake forms, requested identification and any other necessary paperwork
- Tracks the community needs and allows service providers and funding resources to enhance their services based on statistical reports on community use
- Allows agencies to manage their profiles independently, keeping information up to date and accurate

## ConnectYou.org - Free Online Community Service Directory