

CASE MANAGER- NEWGEN

•An Agency Wide Client
Tracking Software



CaseManager-NewGen

A fully web-based system that works off any device that connects to the internet.

One centralized screen - Enroll clients in relevant agency programs, record services provided, record outcomes achieved, create payment vouchers for payments to vendors, provide referrals, schedule follow-ups.

Go Green with scanning & uploading of documents.

Add Programs and Service Activity on the fly and track clients under different programs and different service activities.

Provide the much-needed option for clients to be able to submit online applications for assistance. Keep your case worker and clients safe in these pandemic times.

Track all your reporting requirements including fund expenditures from different programs.

CASEMANAGER- NEWGEN

- Agencies with multiple locations, servicing multiple counties, share one database providing seamless agency reporting.
- Access to agency data is controlled by multi-level, built-in securities along with user-specific permissions.
- All necessary reports at the push of a button
- Built-in ad hoc report writers allow you to create your own custom report.



Add Programs on the fly thru menu options and track clients served, assistance provided and fund expenditure under these programs.

Shah Software **Welcome to Case Manager - NewGen** Working with: ☒ Client ☐ Initiatives Welcome Neelima

Home Client Intake Services Client Documents Client Assessment System Setup Notice of Payment Reports Calendar Energy Assistance - Texas Utilities

Export Payment Weatherization Front Desk Assist Billing History Volunteer Services Appointment Manager Program Application Online Application

Disaster Relief / Weather Assist Payment

Select Client : Abraham, Abir; Appn.ID:3977; App.Date:01/05/2021; StatusDate:01/05/2021

HouseholdID : Submit

Client Name: Abraham, Abir

Application Type:

Bill(s) to be paid out of:

HLD SIZE	POV_LVL	ELD(60 and above)	CHILDREN(5 and below)	DISABLED	Prev. Payments
1	0	0	0	0	Prev Payments

Application ID	Application Date	Approval Date
3977	Jan 5 2021	01/05/2021

Vendor	Payment Date	Bill Amount	Amount Paid	Account Number	Account Name	Payment For	Pay Classification
BROWN ACE HARDWARE	01/05/2021	475.63	475.63		Abraham Abir	Repairs	3.Restore home energy
CHAMPION ENERGY	01/05/2021	692.49	692.49		Abraham Abir	Repairs	3.Restore home energy
CLARKS GH APPLIANCE	01/05/2021	184.56	184.56		Abraham Abir	Repairs	3.Restore home energy
---Select---						---Select---	---Select---

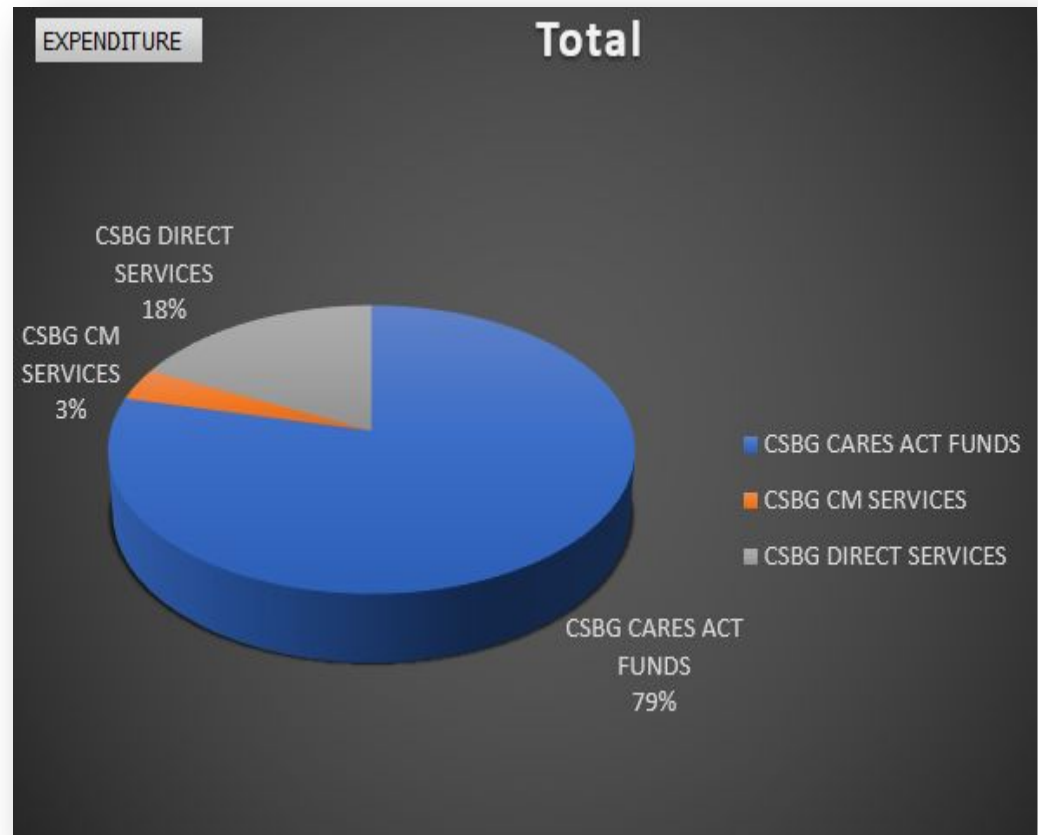
Notes: Client home had lot of destruction from Hurricane Sally. Client was helped under the extra funding received for Hurricane Sally / Weather Assist.

Save

Get detailed expenditure reports for any program you track

Period 6/1/2020– 12/31/2020

PROGRAM	EXPENDITURE
CSBG CARES ACT FUNDS	\$781,438.82
CSBG CM SERVICES	\$35,584.25
CSBG DIRECT SERVICES	\$175,050.20
Grand Total	\$992,073.27



Break any report further as necessary.

One additional click, if you need to break a report down by county, by city or by zip code

EXPENDITURE	Counties															
PROGRAM	ANDREWS	DAWSON	ECTOR	FISHER	GAINES	HOWARD	MARTIN	MIDLAND	MITCHELL	NOLAN	REEVES	SCURRY	UPTON	WARD	WINKLER	Grand Total
CSBG CARES ACT FUNDS	\$19,492.87	\$34,525.45	\$281,669.42		\$2,171.42	\$60,845.66	\$8,160.77	\$323,600.12	\$3,926.49	\$20,081.07	\$2,071.65	\$18,295.36	\$587.21	\$3,188.45	\$2,822.88	\$781,438.82
CSBG CM SERVICES		\$15,356.12	\$1,050.00					\$7,327.95				\$6,748.18		\$5,102.00		\$35,584.25
CSBG DIRECT SERVICES	\$8,392.37	\$9,217.60	\$77,105.68	\$656.00	\$2,850.00	\$9,634.26		\$44,879.68	\$1,947.60	\$7,644.38	\$2,132.60	\$5,107.78		\$4,987.77	\$494.48	\$175,050.20
Grand Total	\$27,885.24	\$59,099.17	\$359,825.10	\$656.00	\$5,021.42	\$70,479.92	\$8,160.77	\$375,807.75	\$5,874.09	\$27,725.45	\$4,204.25	\$30,151.32	\$587.21	\$13,278.22	\$3,317.36	\$992,073.27

Break your reports down by cities, zip codes as well.

Zip Code	a. LIHEAP-Home Energy	b. LIHEAP-Summer Crisis	d. LIHEAP- CARES Act / Weather Assist	Grand Total
75230	\$173,525.00	\$47,040.19	\$216,002.19	\$436,567.38
75240	\$286,825.00	\$55,174.43	\$451,704.78	\$793,704.21
75321	\$52,250.00	\$10,835.78	\$82,267.92	\$145,353.70
Grand Total	\$512,600.00	\$113,050.40	\$749,974.89	\$1,375,625.29

Drill Down Capability on reports

Select Date Range

1/1/2020

1/31/2020

Select Programs

CSBG Rental assist

CSBG Cares Act

CSBG Utility Assist

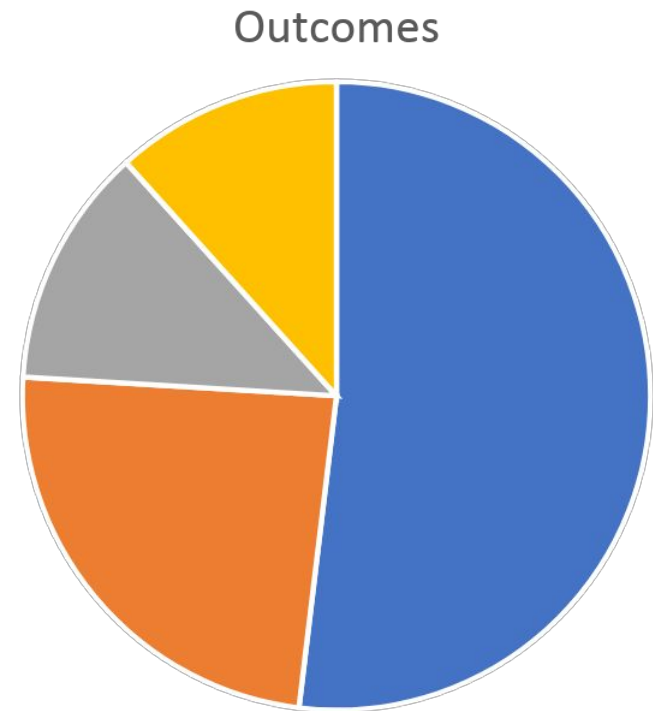
CSBG UNDUPLICATED INDIVIDUALS AND HOUSEHOLDS SERVED
01/01/2020 - 01/31/2020

EDUCATION (24 Years and Above)		MONTHLY NUMBER OF INDIVIDUALS SERVED - UNDUPLICATED COUNT		
a. 0-8			152	
b. 9-12/Non Graduate			134	
c. H.S. Graduate/GED			170	
d. 12+Post Secondary			82	
e. 2 or 4 Yr. College Graduate			32	
Grand Total:			570	
OTHER CHARACTERISTICS		MONTHLY NUMBER OF INDIVIDUALS SERVED - UNDUPLICATED COUNT		
Disabled		198	161	
No Health Insurance		939	102	
Veteran		6	178	
Grand Total:		1,143	266	
MONTHLY NUMBER OF HOUSEHOLDS SERVED - UNDUPLICATED COUNT		INDIVID	HeadOfHhld	HouseHhld
a. Single parent/female			LEE GARCIA	101230
b. Single parent/male			JAMES CONOR	101220
c. Two-parent household			TRTR YUT	103201
d. Single Person			Jason Harris	109362
			Greg George	116321
			Christy MJ	117412
			Mary Delia	102748
			Larson Gary	111214

Click on any line item in the report to drill down to actual client data

Generate Outcome Report in couple of clicks and export it to Excel for further data manipulation

Outcomes	# of Households
Unemployed adults who obtained employment (up to a living wage)	231
Employed participants in a career-advancement related program who increased income from employment through wage or salary amount increase	107
Individuals who obtained a recognized credential, certificate, or degree relating to the achievement of educational or vocational skills	55
Unduplicated persons who achieved a household income above 125% transitioning to self-sufficiency	52
Households who avoided eviction	27
Households who avoided foreclosure	41



Track 'Family Self Sufficiency' matrix. And use the system to aggregate the results into meaningful numbers to help you develop your Service Plan

FAMILY SELF SUFFICIENCY SURVEY

EDUCATION - JOB SKILL / CERTIFICATES	COUNT
Post Secondary degree, Masters or Doctorate	2
Post Secondary Degree, Bachelors, Associates	103
Certificate or license from a training program of 3 years or longer	48
Certificaitonor License from a 2-3 year program	255
Certificate or license from a training program of 1 year	189
Certification or license from a less than 1 year program	1306
Has limited marketable skills	1004
Has no marketable skills	53
TOTAL	2960

COUNT





Dozens of Pre-Programmed reports

- **Unduplicated Report**
- **Service Activity Report**
- **Outcome Report (NPI Report)**
- **Family Self Sufficiency Survey**
- **Fund Expenditure Report**
- **Volunteer Hours Report**
- **Front Desk Walk in Report**
- **LIHEAP Data Performance Report**
- **LIHEAP Household Assisted Report**
- **Ad hoc query for customized reporting**

- A 'built-in' ad-hoc reporting tool is available for custom reporting.
- Custom reports created can be saved on your local PC for reuse at later date.
- Export such reports to Excel or CSV for further manipulation.

FASTRACK

The easy way to have client submit and track their online applications

Now available in English and Spanish

FASTRACK is a link on your web page that allows clients to submit online application for assistance from safety of their home.

Staff can view/print applications received and move these applications into the database with a mouse click — saving hours of manual labor!

Caseworker can mark client application as 'Pending' or 'Approved' or 'Denied' and make notes and comments for client.

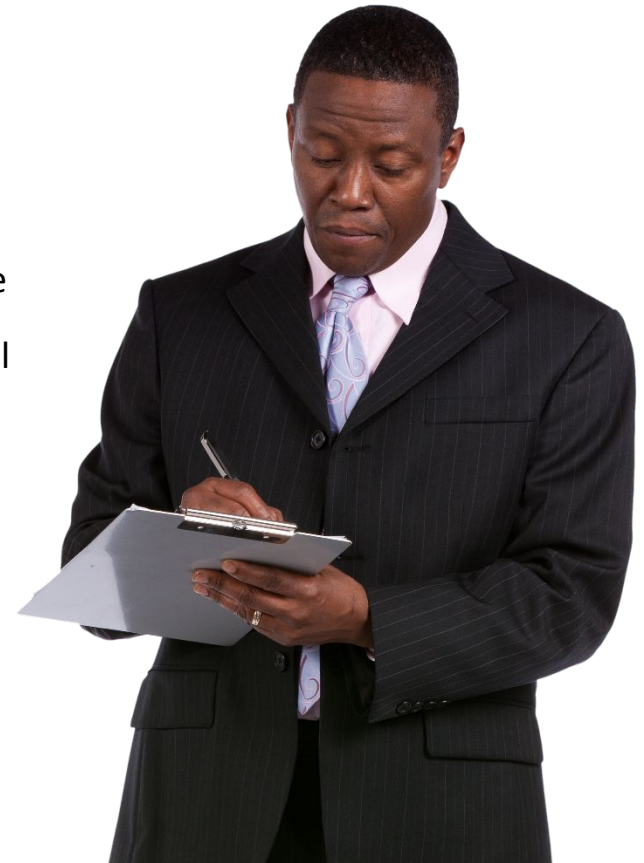
Customers can log in and check on status of their application and submit any documents that were missed out. Instant notification sent to assigned caseworker

Greatly reduce the amount of time you spend with a single client thereby allowing you to work with more clients on daily basis.



Case Manager NewGen Summary

- A fully web-based system that works off ANY device that connects to the internet.
- Includes 'Scan Space' on the server – allows agencies to upload documents.
- Track Client Services, Enrollments and Outcomes.
- 'Economic Impact' section allows the case worker to document the economic impact created from their services. This allows agencies to create reports on 'ROI' (return on investments) helping them tell their full story.
- Includes client's need assessment module. The assessment responses are aggregated, and reports are displayed graphically.
- Track Family Self Sufficiency Matrix
- Add programs and service activities on the fly and track clients served and funds expended.
- Dozens of pre-programmed reports. All necessary reports at the touch of a button.
- Ad-hoc report writer included for customized reporting.



Support, Training & Upgrades

- Unlimited Toll-free support, Email support
- One-on-one webinars scheduled on requests
- Free upgrades ensures all our customers are all on same version allowing us to provide top notch support.
- Periodic webinar trainings scheduled for all customers. All webinars are recorded, and recordings made available to all customers.





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