Shah Software
Customized Software Solutions

25+ YEARS
SUPPORTING COMMUNITY-BASED ORGANIZATIONS

CaseManager NewGen

An Agency Wide Client Tracking Software

One integrated platform to manage programs, clients, services, outcomes and reporting—so you can focus on what matters most: **serving your community.**

ONE CLIENT. ONE RECORD.
Complete view across programs and services.

WORK ANYWHERE. ANY DEVICE.
Secure, web-based access from the office or in the field.

POWERFUL INSIGHTS. BETTER OUTCOMES.
Smart reporting and dashboards to drive decisions and demonstrate impact.

SECURE. COMPLIANT. RELIABLE.
Multi-level security, audit trails and role-based permissions.

- ONLINE APPLICATIONS
  FASTRACK KIOSK
- DOCUMENT MANAGEMENT
  GO PAPERLESS
- AGENCY WIDE VISIBILITY
  MULTI-SITE SUPPORT
- ADVANCED REPORTING
  DRILL DOWN & EXPORT
- CASEWORKER ALERTS
  STAY INFORMED

Better Data. Better Decisions. Better Outcomes.

See the difference CaseManager NewGen can make.
Schedule your personalized demonstration today!

shahsoftware.com
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CaseManager NewGen

An Agency-Wide Client Tracking Software

One system. One database. Smarter client services. Stronger communities.

Built for community-based organizations

CaseManager NewGen brings client intake, program enrollment, services, outcomes, payments, referrals, follow-ups and reporting together in one secure, web-based system.

25+
YEARS SUPPORTING COMMUNITY-BASED ORGANIZATIONS

Web-Based & Accessible
Works from any device with an internet connection.

One Centralized System
Enroll clients, record services and outcomes, create payment vouchers, provide referrals and schedule follow-ups from one place.

Go Green
Scan and upload documents to maintain a paperless, organized client record.

Flexible Programs
Add programs and service activities as needed and track clients and fund expenditures across them.

Secure Access
Multi-level built-in security with user-specific permissions.

Multi-Site, One Database
Multiple sites and counties can share one database while retaining site-level reporting.

Better Data. Better Decisions. Better Outcomes.

Built for the Way You Serve

Manage the full client journey from intake through outcomes.

1 **CLIENT INTAKE**
Create a centralized client record and capture the information your agency needs.

2 **PROGRAM ENROLLMENT**
Enroll clients in relevant agency programs and service activities.

3 **SERVICES & PAYMENTS**
Record services, create vendor payment vouchers and track fund expenditures.

4 **OUTCOMES**
Document outcomes and economic impact to help tell your agency's story.

5 **REFERRALS & FOLLOW-UPS**
Provide referrals, schedule follow-ups and keep staff coordinated.

6 **DOCUMENTS**
Upload and organize client documents in one secure record.

Online Applications

Allow clients to submit applications for assistance online. Keep clients and staff connected while reducing manual intake.

FASTRACK

Staff can view applications, move them into the database, update status, receive submitted documents and support client status tracking.

Instant caseworker visibility: Clients can submit missing documents and check application status; assigned caseworkers can be notified when documents are received.

Powerful Reporting. Better Insights.

Turn your program data into information you can use for funding, compliance, planning and impact reporting.

PROGRAM EXPENDITURES

Track expenditures by program and fund.

GEOGRAPHIC BREAKDOWNS

Break reports down by county, city or ZIP code.

DRILL-DOWN REPORTING

Click report line items to view the underlying client detail.

OUTCOME REPORTING

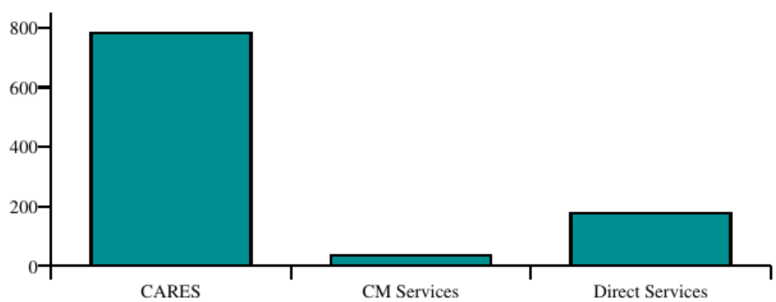
Generate outcome reports in a few clicks and export to Excel.

FAMILY SELF-SUFFICIENCY

Track and aggregate Family Self Sufficiency measures.

CUSTOM REPORTING

Use the built-in ad-hoc report writer and export to Excel or CSV.



Example Program Expenditure View

CARES Act Funds

CM Services

Direct Services

Dozens of pre-programmed reports include Unduplicated, Service Activity, Outcome (NPI), Family Self Sufficiency, Fund Expenditure, Volunteer Hours, Front Desk Walk-In, LIHEAP Data Performance and LIHEAP Household Assisted reports.

One Digital Door. One Complete System.

AllConnect + CaseManager NewGen

Connect the client-facing application experience with the agency's internal case-management workflow - from online application through services, reporting and outcomes.

1	2	3	4	5
CLIENT	**ALLCONNECT**	**ALERT**	**CASEMANAGER**	**OUTCOMES**
Discover programs	Apply + upload	Program manager notified	Review + manage	Serve + report

ALLCONNECT - THE DIGITAL FRONT DOO

Give residents one place to discover programs, answer guided eligibility questions, submit online applications and upload supporting documents from any device.

Applications can be routed into a clearer staff workflow with status visibility for the client and agency.

Latest enhancement: when an application is received for a program, the appropriate program manager is alerted so new applications can be acted on promptly.

CASEMANAGER NEWGEN - THE AGENCY

Bring client records, program enrollment, services, payments, documents, referrals, follow-ups and outcomes together in one centralized system.

Track program expenditures and reporting requirements, then drill down by county, city or ZIP code and export data for further analysis.

Multi-site agencies can share one database while maintaining site-level reporting and user-specific access controls.

Why the combination matters

Less friction
Clients apply online instead of starting with

Faster awareness
Program managers know when applications arrive.

One workflow
Staff move from intake to service delivery and

Better visibility
Clients and staff have clearer application

From Application to Outcome - Connected.

See how AllConnect and CaseManager NewGen can work together for your agency.

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Everything You Need. All in One System.

A complete client-management platform backed by responsive support, training and upgrades.

Web-based access	Use CaseManager NewGen from any internet-connected device.
Agency-wide tracking	Track client services, enrollments, outcomes and assistance in one database.
Document management	Upload client documents and maintain organized electronic records.
Need assessment	Capture assessment responses and aggregate results for graphical reporting.
Economic impact	Document the economic impact of services and support ROI reporting.
Flexible reporting	Use pre-programmed reports plus ad-hoc reporting for customized analysis.

SUPPORT, TRAINING & UPGRADES

Unlimited toll-free and email support
One-on-one webinars available on request
Periodic customer training webinars
Recorded webinars made available to customers
Free upgrades help keep customers on the same version

Ready to see the difference?

Schedule a personalized demonstration and discover how CaseManager NewGen can help your agency simplify client services, strengthen reporting and spend more time serving people.

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Better software. Stronger communities.