Case Management

Case management spans many situations, needs, and environments, but these share many common key considerations and best practices. In this explainer, we'll show how ClientTrack® is a case management platform that facilitates efficiency, regulatory compliance, and great reporting for any case management need.

The social determinants of health (SDoH) are the circumstances that impact one's health outcomes, such as financial situation, education, access to health care, and more. Case management helps providers coordinate services across SDoH to provide comprehensive, whole person care.

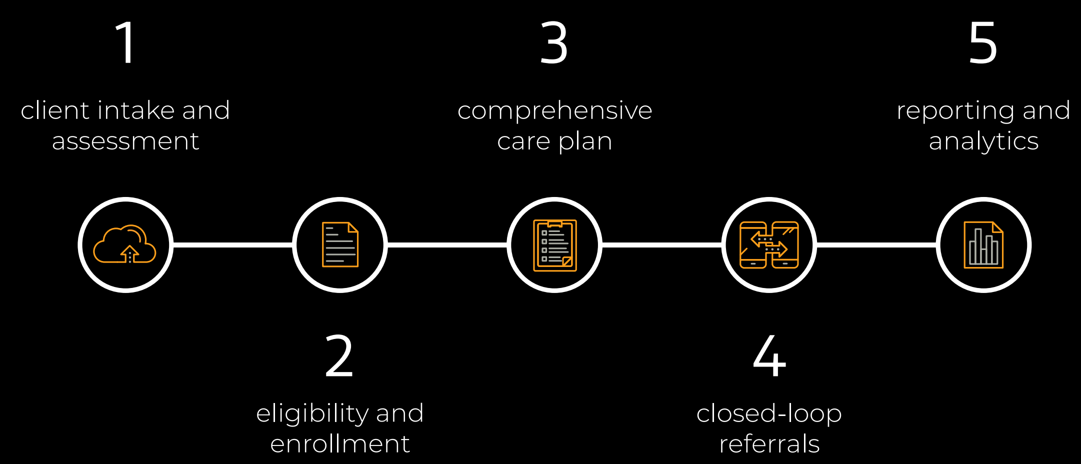
What Is **Case Management?**

Case management is the process of assessing, planning, collaborating, and monitoring care for individuals with complex needs.

All too often, health and human services organizations lack coordination, with services split among a wide range of payers, providers, and community resources, with each separately addressing individual symptoms of a person's underlying need. But without coordination and planning, they cannot address the root issues the individual is facing.

This inefficiency drives up costs, drains community resources, and yields poor outcomes for those in need. Case management seeks to solve these issues by providing a single database for all providers to coordinate care, where case managers can refer individuals needed services, ensure the services are received, and report outcomes to stakeholders.

Here's How Our ClientTrack Case Management Platform Handles the Process:



1 Client Intake and Assessment

ClientTrack supports coordinated entry, enabling a no-wrong-door approach where client data can be captured anywhere, any time. The logic-driven intake workflow is designed to capture all data required for regulatory compliance and reporting, and includes built-in assessments of client needs and priorities.

2 Eligibility Engine

ClientTrack's eligibility engine provides you with sophisticated, configurable eligibility

rulesets, as well as a standardized assessment library, coupled with the ability to configure or build assessments. ClientTrack enables you to determine which services the client needs and qualifies for, helping you connect people to needed services quickly and efficiently.

3 Comprehensive Care Plan

All this data is stored in a single database, a hub that connects individuals with the services they need. With ClientTrack, case managers can create a comprehensive care plan for each client, setting targeted outcomes and meaningful goals.

4 Closed-loop Referrals

ClientTrack makes it easy to enroll eligible clients in services and programs, based on immediate need or in connection to a comprehensive care plan. Our closed-loop referral process means that after a client has been referred to a service, the referring party will be notified of the client's progress so they can see they get the services they need.

5 Reporting and Analytics

ClientTrack's push-button reports help facilitate accountability and sharing your successes. The data intake workflow ensures that you have the right information for required reports, making it easier than ever to show outcomes to partners, stakeholders, and funding sources.

Beyond the Basics

Our case management approach is married to expertise, experience, and technological innovation. We're constantly seeking to provide the best, working to improve our platform and push the boundaries of what case management can do.

Do more with ClientTrack®

ClientTrack's approach to case management is designed to maximize your efficiency, provide the best possible client experience and improve their outcomes, and lead to reduced costs—all so you can reinvest your time and resources more effectively. Here are some ClientTrack features that help you save time, unburden you from tedious and repetitive tasks, and allow you to add value to your case management platform as your needs evolve.

Compliance Simplified

Our team includes national leaders and experts in HUD and federal partner compliance, and our ClientTrack platform is built to provide full regulatory compliance in data collection and storage, privacy and security, data standards, and reporting. You can rest easy knowing that your system is purpose-built to capture, store, and report your data according to the latest requirements.

Powerful Ad Hoc Reporting

ClientTrack empowers you to tell data-driven stories of your successes to funding sources and stakeholders, driving superior outcomes. Our reporting tools include all common prebuilt reports as well as in-app tools to generate custom reports on the fly with drag-and-drop ease. ClientTrack makes it easier than ever to share outcomes so you can generate reports in minutes.

Integration and Migration

ClientTrack's REST API allows for real-time data integration and enormous data ingestion, with controls for data deduplication, quality checking, and HUD CSV file import and export. Save time and effort with improved data quality, and integrate with third-party databases or tools to provide the best coordinated care possible to the people you serve.

Single Sign-On (SSO)

ClientTrack helps cut down on the administrative burden by supporting Single Sign-On (SSO). Our platform works with any OAuth identity provider that supports OpenID Connect, including Azure Active Directory and Open Access Management, as well as with LDAP authentication.

This lets you reduce the number of passwords and sign-ins necessary for agencies that use multiple applications in their work.

508 Compliance

ClientTrack is fully 508 compliant. Eccovia is committed to providing an accessible platform that enables access to information and usability of features. To Eccovia, web accessibility encompasses all disabilities that affect access, including visual, auditory, physical, speech, cognitive, and neurological disabilities. Eccovia makes every reasonable effort to accommodate users by following the W3C recommendations and 508 guidelines.

Security

Hosted in Microsoft Azure, ClientTrack's databases are protected with state-of-the-art security, providing protection against threats such as distributed denial of service (DDoS); Azure backups and Azure Site Recovery to ensure your data is recoverable in disaster scenarios; and easier compliance with external privacy standards, laws, and regulations, including GDPR, HIPAA, ISO 27001, HITRUST, and FERPA.

ClientTrack enforces segregation of duties and limiting employee access to only the data needed to perform assigned job functions based on role, helping keep client data safe.

Finally, ClientTrack features a web application firewall (WAF) that actively monitors and protects against bad traffic, keeping the application and client data safe. ClientTrack leverages 256-bit SSL and TLS 1.2 encryption both in transit and at rest, so your data remains safe wherever and however you access ClientTrack.

In-App Design Tools

ClientTrack puts you in the driver's seat with the in-app Designer Toolset, which gives you the power to add functionality and features without costly custom code or change orders. As your needs change, your ClientTrack platform can change right along with you. Here are just a few of the tools ClientTrack puts at your disposal.

Form Designer

The Form Designer enables authorized administrators to create new or modify existing forms. Administrators have complete control over all elements and element properties, including field placement and type, labels, defaults, required status, display format, and list options.

Workflow Designer

Administrators can define and manage workflows like client intake. The Workflow Designer can set workflow variables through queries, direct user questions, or data entry to change the workflow steps. The designer supports different workflow paths, looping processes, and any number of business rules applied to data collection.

Report Designer

ClientTrack's Report Designer represents a robust standalone tool for local administrators to design configured reports. Report Designer leverages queries or stored procedures as data sources and defines additional summarizations and groupings. These reports can be viewed in-app, exported to PDF for printing, or exported to Excel.

Dashboard Designer

With Dashboard Designer, administrators can create common dashboards for end users. Dashboard elements may include any information designed by the ClientTrack Form Designer, ClientTrack Reports, or charts resulting from ClientTrack Query Designer queries.

To learn more about how your organization can benefit from partnering with Eccovia and our industry-leading ClientTrack software, visit eccovia.com or call **888.449.6328** to speak with one of our experienced solution experts.

ClientTrack®

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REAL SOLUTIONS • REAL PERSON IMPACT

Eccovia is a trusted provider of industry-leading software and services for health and human service organizations. As an innovator in cloud-based technology, we are at the forefront of case management solutions for organizations of all sizes. With diverse partners in the non-profit, private, and public sectors, Eccovia is dedicated to providing compliant, collaborative, outcomes-oriented solutions to those who create a lasting impact in the lives of the people and communities they serve.