Tracking At-A-Glance®

Case Management and Performance Tracking Software

Features:

- Real-time, web-based solution (accessible anywhere in the world with an Internet connection)
- User-friendly, easy-to-read screens including Activity Log, Caseload Triage, General Information, Household Records, Social Network, Income and Assistance, Education, Employment, Individual Development Plan (IDP), Work History, Referrals, Milestones, Client Notes, and more
- Comprehensive, customizable Needs Assessment that tracks initial needs (creating a baseline) and current needs to show client progress in employment, job training, education, transportation, childcare, health, housing, finances, legal, and other areas
- Creation of the IDP from the Needs Assessment
- Caseload Triage responses generate the risk classification and determine the frequency of contact
- Group feature which allows users to add up to 30 clients at one time with minimum input
- Queue feature which creates a collection of clients to execute common functions quickly on each set
- Dedicated e-mail function which allows users to quickly compose and send e-mail messages with up to three attachments to an individual or a group
- Ability to refer or enroll multiple clients in a referral or assign a milestone to a group of residents in a single instance.
- Optional modules include Grant, Relocation, Money Management, Budget, Homeownership, and Survey
- Multiple levels of security such as auditors, guests (service providers), staff, site managers and corporate users, provide access only to the information users need
- Ability to purchase additional 'departments' that operate independently within one agency
- Robust internal reporting without the need for third party software. Every field in the database is "searchable" and can generate a custom report within seconds
- Frequently used search parameters can be saved and re-run anytime
- Performance easily measured by activity (enrollments and completions), service provider, case manager, location and/or any other search criteria in the database
- Automatic tracking of dollars spent (whether actual or in-kind), by service, by provider, by client, by funding program, by date, etc
- Customized home page showing all Staff Announcements and the user's Daily Appointments, Staff and Client Follow-Ups, Staff Messages, Client Messages and Outside Site Messages that have been copied to that user
- Maintenance area that alerts users of "red flag" areas in the system that need attention. They could reflect possible errors or activities waiting to be performed
- Customization section allows the Site Administrator to customize all drop-down lists
- Ability to attach scanned documents, external documents and/or letters created directly in the system to the appropriate client record so that his/her electronic and hard copy files are identical
- Creates mailing labels based on the results of any user's custom database search
- Search Placements allows employers to search your database for qualified residents

For a demonstration of Tracking At-A-Glance®, please contact:

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