Case management by spreadsheet is insecure, inefficient, and costly.

63% of case managers reported that their case management systems were not effective in helping them track client progress.

American Case Management Association (ACMA). (2023). Case Management Standards.

» Everything is done **manually**
Manual processes lead to a poor client experience, resulting in duplicated efforts, siloed data, and compromised client trust.

» **Outdated** Data Management
Inadequate data tracking and accuracy compromises service delivery, decreases client confidence, and increases program/funding risk.

» Sensitive Data **Stored Unsecurely**
Insecure storage of sensitive client data in spreadsheets and paper files risks of data breaches that can cause significant harm to already vulnerable clients.

» **Disjointed Collaboration** Across Teams
Every agency and organization maintains their own spreadsheet which limit coordination and communication, leading to gaps in service and increasing the likelihood that clients will fall through the cracks.

LET'S CHAT!   🌐 **www.forwardplatform.com/sync**   📞 **(855) 582-FWRD (3973)**   ✉ **info@forwardplatform.com**

FORWARD sync

Modern, Human-Centric Client and Resource Management Software that Accelerates Service Delivery

INTAKE
Securely capture and track client information

- Collect and store client information and data
- Needs assessment and risk scoring
- Store relevant documents
- Track changes to client status/conditions
- Add and organize notes for each client

COMMUNICATE
Securely connect with clients through multiple channels

- Send, receive, and store text messages and emails in one centralized place
- Conduct & record outbound phone calls
- Receive inbound voice messages
- Realtime transcription and language translation of voice messages, texts, and emails
- All communication tied to client's profile, not personal devices/emails

COLLABORATE
Accelerate inter-agency collaboration

- Real-time collaboration within a client profile
- Share case notes across agencies
- Referral and program management
- Role-based access to client data and workflows
- Case manager/Provider assignment
- Manage and audit workflow

MONITOR + TRACK
Track program progress and social impact

- Securely import and export case details
- Generate custom reports and dashboards at client, aggregate, and case manager levels
- Track program deliverables
- Secure data storage and management
- Protect user privacy