



SOLUTION BRIEF | Non-Profit

# Case Management

*Helps non-profit organizations advance their mission by supporting the entire client life cycle*

Non-profit organizations and their funders depend on specialized processes and technology to manage cases, participants, outcomes, and other requirements. Manual, paper-based processes OR outdated, ill-equipped technology can exacerbate the complications inherent in a network of care, resulting in duplication of effort and errors. This can impede your ability to provide the right level of care and negatively impact outcomes.

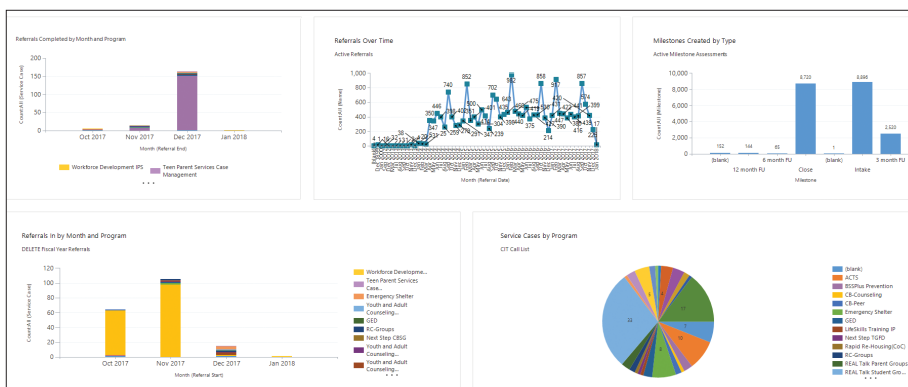
### Support a Client-First Focus

HSO's solutions for Case Management, powered by Microsoft Dynamics 365, the Microsoft Cloud for Nonprofit, and the Microsoft Dynamics 365 Nonprofit accelerator, are built on an integrated client and case management framework designed to support the complete client lifecycle through request, receipt, and follow-up of services:

**Client-focused.** Client intake, assessments, and personalized action plans improve client service and experience.

**Data-driven.** Baseline and milestone data provide outcomes to funders and trends to improve program and service performance.

**Flexible.** A robust, flexible framework supports a wide variety of programs, supporting rapid onboarding of new services while providing program-specific workflows and data collection requirements.

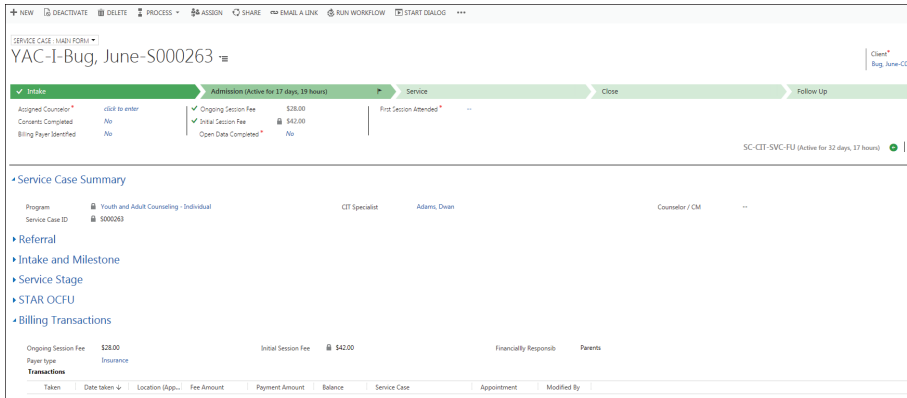


### A Flexible, All-Encompassing Framework

HSO's Case Management solutions are transparent and contain reporting functionality to meet all administrative and financial oversight procedure requirements. Additionally, security at each step can be locked down to suit the needs of a particular organization's processes and help them comply with HIPAA and other privacy requirements.



- Gold Cloud Platform
- Gold Cloud Business Applications
- Gold Cloud Customer Relationship Management
- Gold Enterprise Resource Planning
- Gold Application Development



**“The tools we’re developing with Microsoft and HSO are catalysts to move us from being service providers to problem-solvers and industry leaders.”**

**- Susan McDowell:  
Executive Director**



The tools included in this flexible and customizable framework are designed to support the case management of social services aimed at providing a pathway to self-sufficiency in areas of mental health, education, employment, housing, and more. It has been used to manage casework in many areas, including mental health, foster care/transitional services, education/workforce readiness, and housing assistance/homelessness. Regardless of the types of services, improve efficiency and efficacy with process support at every stage:

**Operations:** Improve provider and partner relations and better manage funding with self-service portals and relationship insights, as well as accessible and informative reporting. Monitor and manage workloads and time spent to improve operational efficiency and team sizes.

**Front Desk:** Streamline client interactions with global appointment management and visibility, as well as client fee and balance tracking. Route and manage requests for internal and external services.

**Intake:** Standardized and extensive intake data provides valuable milestones for measuring outcomes throughout service. Flexible processes and checklists allow lines of business to collect as much or as little intake data as is applicable to their services.

**Client and Case Management:** Collaborate with other case managers to define a collective action plan for personal growth. Shared client data allows all service providers the most complete information possible to improve understanding and better tailor services.



**“This database in Dynamics 365 is going to help us function more effectively to drive our goals and act on our vision. It’s going to help us connect youth to the services they need.”**

**- Felicia Lemons: Director of Training and Strategic Initiative**



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