



**eccovia**<sup>®</sup>  
REAL SOLUTIONS • REAL PERSON IMPACT



# MAKING THE SWITCH

Top Considerations for  
Adopting a New  
Case Management Solution



Real Data. Real People. Real Insight.

[eccovia.com](http://eccovia.com)

# Making the Switch

## Top Considerations for Adopting a New Case Management Solution

### 1

#### PRIVACY AND SECURITY

Security is rightfully top of mind in health and human services. We all care deeply about honoring the privacy and confidentiality of the people we serve, so the number-one consideration for case management software should always be the vendor's security policies and features—and the architecture supporting it. You'll need to understand how the solution encrypts data, how data is stored and accessed, and who has access.

#### AT MINIMUM, CASE MANAGEMENT SOFTWARE SHOULD:

- » **Provide the tools and safeguards necessary for you to comply with all federal and state regulations, such as GDPR, HIPAA, HITECH, HITRUST, ISO 27001, and FERPA**  
*Essential laws regarding privacy of sensitive client data, including personal identifying information (PII); your specific use case may require compliance to additional standards, (e.g., VAWA, VOCA)*
- » **Encrypt data in transit and at rest using 256-bit SSL and TLS 1.2**  
*Prevents client data from being compromised by external breach*
- » **For SaaS, software should be capable of meeting FedRAMP High classifications (e.g., Microsoft Azure)**  
*Federal Risk and Authorization Management Program (FedRAMP) is a federal compliance program that rates cloud service offerings (CSOs) against a robust, standardized security assessment*
- » **Offer configurable role-based security**  
*A security model that allows users access to client data, functions, administrative privileges, and so on, based on their role within your organization, with roles that can be defined by your organization*
- » **Have robust password requirements**  
*A minimum standard might include at least 10 characters, as well as a combination of upper- and lower-case letters, numbers, and special characters; stronger security models will require new passwords after a set period of time*
- » **Enforce automatic timed logout**  
*To prevent unauthorized access, a strong security model will automatically log out users who are inactive for a period of time determined by your organization (e.g., 30 minutes)*

Also, consider the flexibility of the software's security model. One size absolutely does not fit all! As your team members take on different responsibilities and shift roles, the security model will need to be able to respond appropriately and ensure that everyone has the right permissions—and none of the wrong ones. With security, pulling off both flexibility and strength is something of a tightrope act, so take a close look at how the vendor balances the two.

# 2

## CONFIGURABILITY

The simple fact is your needs will change over time. As you add programs or modify existing ones, and as you find success and grow, you will need to change your workflows and processes. Will your case management software be able to change and grow with you?

Consider what software and the vendor offer in terms of configurability. What would it take to modify your intake workflow or add a new workflow altogether? How hard would it be to add a new feature? Is the solution rigid and inflexible, or can it accommodate change? Will change require custom code, which is going to be expensive, or can in-app configuration tools handle the need?

### CASE IN POINT: STANISLAUS COUNTY COMMUNITY SYSTEM OF CARE (CSOC)

A great real-world example of the rapidly shifting needs of human services organizations is Stanislaus Community System of Care (CSOC), serving Stanislaus County, California. In 2019, CSOC found itself with an unexpected challenge: a new and very large homeless encampment rapidly formed underneath a public bridge. CSOC acted quickly to set up an emergency homeless shelter to protect these people from the elements, capture and track their needs, and connect them to essential services.



Using the in-app configuration tools provided by ClientTrack, Eccovia's case management solution, CSOC created a new program to track each person in the encampment, gather their data, and prioritize service delivery by urgency. ClientTrack's flexibility allowed them to quickly understand what they were looking at: 377 total people, including 20 children under the age of 7 and 20 people over the age of 63, who could rapidly receive needed services like showers, weather-safe shelter, food, and more. They were even able to track the 155 dogs and 20 cats living in the encampment!

# 3

## INTEGRATION

Any new case management solution will have to integrate with existing systems and databases. Does the vendor explain its process for integrations and data migrations? What does the integration process look like? For example, does the migration process include quality assurance and testing of data quality and integrity?

The ability to integrate with other providers and systems is essential if you want to get a holistic look at the needs of the people you serve. Providers tend to look at a client through the narrow confines of the services they provide (e.g., behavioral health, substance abuse, justice involvement, homelessness) which provides only one snapshot of the client and fails to take into account the full picture of a client's needs. A client's needs are likely complex and multifaceted, so when your case management platform can serve as a central hub connecting all of these services, your organization can get that big-picture look and fully serve your client's needs—treating people rather than isolated symptoms.

It's also worth looking at your own data migration strategy. You may not want to migrate all data; consider how far back you want to go, in alignment with compliance and reporting needs. Further, what's your current data consent and security model, and can that have an impact on integration? Will the vendor be able to handle these issues in its integration process?

# 4

## REPORTING

One of the most important aspects of any case management solution is its reporting capabilities. Reporting and analytics are how you tell the story of your organization, quantify the efficacy of your programs, and account for your use of funds and resources, so it's crucial that your software gives you the tools you need to do that quickly and effectively.



### AT MINIMUM, CASE MANAGEMENT SOFTWARE SHOULD OFFER:

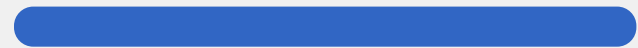
- » Prebuilt reports for the services provided
- » Custom reports that allow you to create new reports, as needed, to account for data not covered by pre-built reports
- » Real-time and ad hoc reporting capabilities

Consider whether the vendor's reporting toolset offers an accessible and user-friendly experience. Reporting tools need to be powerful and capable of handling complex operations, but if the interface is so complicated and unintuitive that it takes a challenging training regimen just to use them, it creates an enormous learning curve that can hold your organization back.

Also look at the case management solution's capacity for data analytics. Does the software help you engage more with your data, identify trends, monitor program effectiveness, and so on, to inform a more data-driven strategy?

For more advanced data analytics, especially for large data sets coming from a wide variety of sources, consider looking at data warehousing in addition to case management—it's a matter of having the right tool for the job. There are different ways of gathering, storing, and accessing data that better serve specific needs: for a case management solution, where you have lots of users making changes to the database as they intake client information, perform assessments, add case notes, and so on, you want a transactional database optimized for those interactions.

But if you need a database for analytics, where the priority is on querying large datasets to uncover patterns and trends, a transactional database won't be enough. A data warehouse built for query speed with built-in analytics tools like Power BI, such as Eccovia's ClientInsight, is required in such cases.



Eccovia's community intelligence platform, ClientInsight, allows organizations in health, social, and human services to integrate their data together into a single source of truth with one, secure point of access. Its data pipeline architecture provides organizations a secure, configurable way to meld and de-duplicate data from multiple sources, with fully configurable access that empowers administrators

ClientInsight's empowers administrators with powerful, ad hoc reporting tools providing insights on client and service trends. With ClientInsight, your organization gains invaluable insight into the big picture, into the data that impacts your community.

# 5

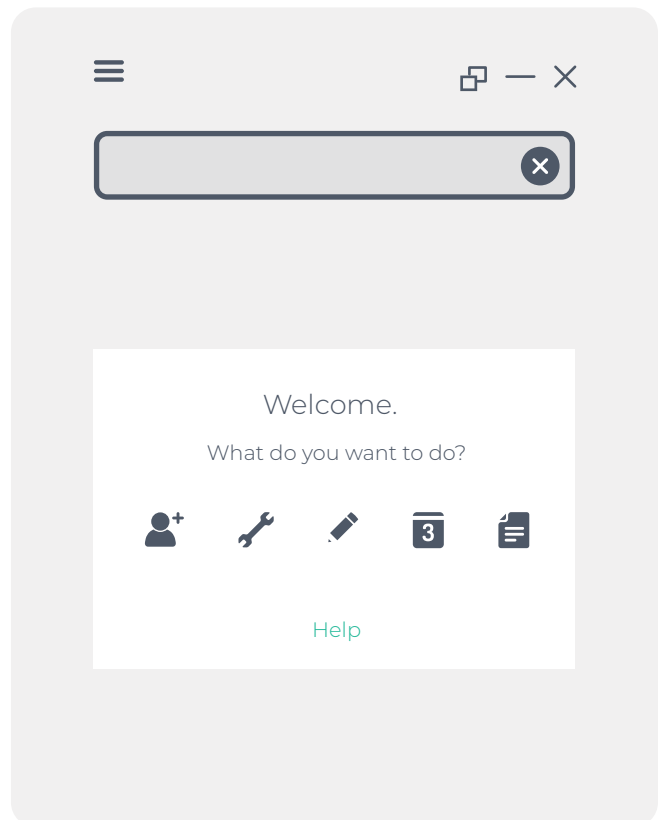
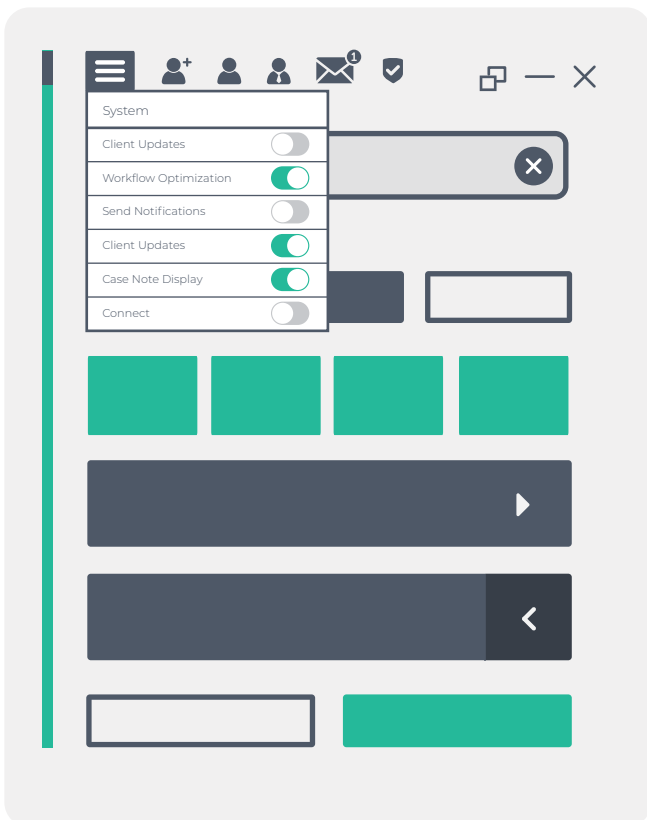
## INTERFACE

It may seem like a simple thing, but the impact of a user interface on efficiency is much greater than it may first appear. Look at your potential case management solution's user interface. Does the vendor provide a preview of the solution? Does the user interface look intuitive and easy to use? Will end users require a lot of training to be able to use the solution effectively?



Imagine you're a case worker and your organization has just adopted a new case management software. You sign in and are greeted with a complex and messy interface. It's hard to find the client intake form, and the form itself is not intuitive, returning error after error; it takes several tries to get the client into the database. And then once intake is complete, you now don't know where to go to find the newly-created client's dashboard. Ultimately, hours that could have been spent helping more clients are instead spent just trying to find what you need.

Further, how accessible is the solution? How well does the software accommodate sensory diversity, such as colorblindness? You need a solution that can support case workers with sensory needs like high-contrast displays, screen readers, and more. Look for 508-compliant solutions; providers, like Eccovia, that have put in the effort to create fully 508-compliant solutions demonstrate their commitment to prioritizing the needs of all users.



# 6

## SUPPORT

What does the case management solution's training and support look like? Do they provide onsite or remote training sessions so that your organization knows how to use the software on day one, or do they rely on a user-directed training model? Do they follow a train-the-trainer model, or will you be reliant on them for expertise going forward? Do they offer responsive support during the hours you'll most need them?

Again, there's no one-size-fits-all option. There are advantages and disadvantages to different approaches. There's a lot to be said for a train-the-trainer model, for instance, as it gives you an in-house expert you can refer to when needed. That's certainly a huge plus! But your organization's needs may differ; it may be that a self-directed, self-paced training regimen is more suited to your needs. And in any event, post-training, it is useful to have an accessible library of training that you can refer back to, establish best practices, and hone your understanding of your solution.

# 7

## THE VENDOR

When you're shopping for software, you're also shopping for a partner. You'll be spending a fair amount of time talking to your vendor long after implementation. How are they to work with? Do they treat their customers well? Do they have the expertise to support your organization?

Look at how long each vendor has been in business and whether they have experience that matches your needs. Also consider the vendor's focus and direction. Is the vendor investing in the future of its case management solution, or is it resting on its laurels? Is the vendor seeking to shift its focus away from your specific needs?

# 8

## COST AND BUDGET

Ultimately, you will be constrained by what your organization can afford. Case management can be costly endeavor. But in the long run, if properly used, a good case management solution can pay for itself several times over in money saved, resources conserved, and improved outcomes. That's why here, as in many other things, it's important to look at the option that will provide the best value for your money, not necessarily the cheapest option.

Evaluate all aspects of pricing, licensing, implementation, data migration, and future configurations, and consider which solution offers the best value both now and down the line. Think back to point 2, where we discussed configurability. An inflexible software solution will not be able to meet future needs it wasn't built to accommodate; to work a rigid solution that isn't built for configurability into a new use case, a new workflow, and so on, you may find it an expensive process if it's even possible. At the end of the day, it may prove worthwhile to invest more money now if it will save you money on recurring or future expenses.





## All Things Considered

That's not an exhaustive list, but it's a solid place to start. And of course, we wouldn't highlight features that our own case management software, ClientTrack, doesn't offer! But while we hope you'll consider ClientTrack, and we're confident in its offerings, we encourage you to compare your options and see for yourself how well they mesh with your needs, your organization, and your budget.

.....

To learn more about how your organization can benefit from partnering with Eccovia, visit [eccovia.com](https://eccovia.com) or call **888.449.6328** to speak with one of our experienced solution experts.



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.



**eccovia**<sup>®</sup>  
REAL SOLUTIONS • REAL PERSON IMPACT



Address:  
Eccovia, Inc.  
2150 W. Parkway Blvd, Suite A-101  
Salt Lake City, UT 84119  
United States



Online:  
[eccovia.com](http://eccovia.com)

