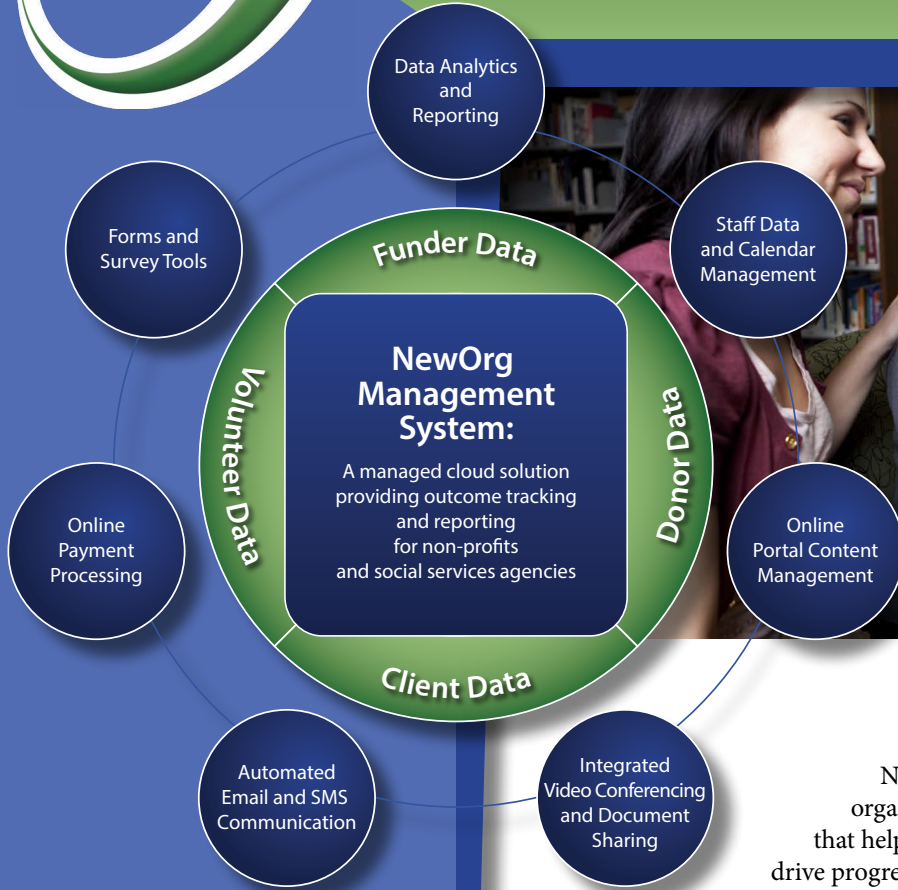


Managing Outcomes and People's Quality of Life



NewOrg Management System: Detailed Case Management Overview

NewOrg Management System for human services organizations is an outcome and case management solution that helps case management staff, managers and executive teams drive progress toward health and social services outcomes.

Client Information: Whether you are looking to improve parenting skills and children's well-being, prevent risky behaviors, help people recover from trauma, or achieve other outcomes, NewOrg can help you serve your clients better. NewOrg provides real-time, client-level data access that assists program teams in delivering services—assessments, case planning, and referrals can be centrally stored and reviewed, identifying progress towards your clients' outcomes.

Program Management and Design: At the program-level, you can ensure that the services designed by all your staff and in all your locations are provided and recorded accurately over time. This in turn allows your service delivery to adjust as needed and your programs to more effectively deliver on your mission.

Meeting Funding and Compliance Needs: NewOrg will allow for efficient aggregation of data and meeting the compliance and reporting needs of your organization more efficiently and accurately. Share your data with all stakeholders, impress them with your success, and secure their long-term support. We support Family Services, Community Services and Children's services Organizations with funding from a variety of Federal, State and Private funders. NewOrg meets the needs of nonprofits, and government groups providing community services. We work with you in addressing your current needs, and as your organization grows and evolves to have more complex data requirement, you can—on your own—modify the system to meet them or access our expert consultants for support.

Selecting the right software solution can help reduce administrative burdens associated with delivering quality care and ensuring positive outcomes in your service population.

- Donor Management
- Donation Management
- Email & SMS Distribution
- Client Management
- Document Management
- Grant Reporting
- Productivity Reporting
- Outcome Tracking
- Scheduling
- Timesheets
- Human Resources
- Collaboration
- Integrated Video Conferencing
- MS Outlook Integration
- Web Site Management
- Event Calendar
- Online Donations
- Online Surveys

Events compile into a calendar overview, allowing scheduling to correspond to compliance deadlines and programmatic needs

Check out some of NewOrg's Extensive Capabilities: Compliance Reporting

NewOrg has customizable compliance reporting in every major market that we serve, including Habitat for Humanity, family services, non-profit funding, drug treatment, immigration/resettlement, and more. Our project team will provide you with workflows designed to capture data and meet the eligibility rules by working directly with you to make sure your organization has the timeliest and most advanced reporting for your organization.

NewOrg Analytics

Spending countless hours on gathering data for board meetings, providing documentation supporting grant funding, or compliance reporting for government funding is all made easy with NewOrg's reporting and analytics tools. Built on a framework that allows for rapid customization as well as a pre-configured list of standard organizational reports, offering incredible flexibility in working with the data your organization captures. Breaking down your data by location, gender, service type, funding source is all simple and available within NewOrg. We also provide export capability most commonly used file formats. Allowing you to integrate with state funding systems, advanced analytics tools like Crystal Reports and IBM Watson Analytics as examples for deep analysis. Everyday reporting can be pre-configured at the Program Design level and provide consistent reports for program and case management staff.

Menu Organization and Defining Roles

With NewOrg the user interface can be designed to provide menus and functionality relating to roles within your organization. Customer specific menus within NewOrg allow you to provide menu's organized in a way that provide your users with your organization's terminology; offering consistency and familiarity to the people generating the data. Removing unneeded terms in the data capture fields simplifies the process for frontline users and provides a clearer picture of the data your organization captures. Meeting the needs of Human Services groups are often varied; NewOrg understands this and provides the capability to configure your system to meet the needs of your specific program while avoiding unnecessary and unneeded fields and terms.



Workflows Structure

NewOrg’s workflow functionality allows for the creation of linked input screens (and forms) based on rules created within the system that match your organizations’ requirements. Workflows allow your team member to generate constituent intake data and processes within your programs, exit data as well as any processes that might require multiple steps and the data flow needs to be managed. NewOrg’s approach to providing custom workflows ensures that your programs processes lead to fulfillment of your programs goals and the data you capture is available at your fingertips. Providing you with real-time reporting for grants, compliance and auditing is ensured with all NewOrg implementation goals.

Forms Manager

NewOrg’s client services framework allows your organization to configure fields and mapped forms that allow the users to generate any form based on data captured within NewOrg. Forms are critical to the delivery and tracking of services provided to your clients and are easily configured within NewOrg for the use of your program and case managers to use. Inter-agency, Funder, Federal or State Agency forms are easily added to the system providing the ultimate flexibility in meeting this need.

Reporting Dashboard

As part of the NewOrg reporting capability, dashboards can be configured and thoroughly customized by each individual user, based on their role within the organization providing real-time views of the reports they most often use. Dashboards can display any data from within the NewOrg database, providing summary lists of data, bar and pie charts, as well as graphs.

Rules and Eligibility

NewOrg’s rules engine allows groups to manage complex program processes easily within your configured system. Make eligibility determinations, apply conditional logic to forms, and generate alerts and notifications for follow-up or actions by your program staff. User forms for your various processes create a pre-configured set of fields displayed based on a single variable or a combination of variables. Example, “Only display these fields if the client is Medicaid eligible.”

- Workflow steps can be based on client conditions. Example: NewOrg’s rules engine allows a variety of conditions using “and”/“or” data logic. “If the client is over the age of 18, then display the adult form. Otherwise display the child form.”
- Rules can be applied in the determination of program eligibility and generate certain steps during the client intake or exit. Goals, trainings, service plans and referrals can then be applied based on policies developed by the program team.
- Finalize your program processes by generating the required alerts and messages to be sent (either within the system or by email).
- Flag your workflows to create an event within NewOrg’s scheduling system for follow-up by case management staff.

The screenshot displays the 'Contact View' for contact #58424. The client's name is Muhammed Lopez, and his status is 'Active'. A reminder is shown: 'Please ask clients if their contact information, emergency contact information and immigration status needs to be updated on the system.' Below this, a table lists various events, including 'iComm - ESW', 'Follow up / home visit', and 'LINC CLB 1LA PT AM REG a JH', with columns for Date, Event Name, Assigned To, Type, and Names.

Track program delivery and progress on a client-by-client basis.

Important note: NewOrg respects confidentiality— all displayed screenshot contact records and service data are generated from anonymized test server data.



Managing Case Notes

Use NewOrg to create a variety of case note templates. The client services manager can pre-populate these notes with data from the system. This approach provides a more effective alternative to pre-printed forms being used by many organizations today. With NewOrg you can also attach signatures and provide an option for emailing case notes. Additionally, NewOrg provides support for a multi-party approval process for case notes. Routing case note through your programs established approval groups or managers. Case notes can be attached to any record within NewOrg and can serve as a quick and efficient way to record detailed case management data.

Email Capabilities

NewOrg's built-in email manager supports SMTP communications and can be selected from any form or screen in NewOrg. The email text body provides support for pre-populated templates allowing data to be merged from the client files. All email addresses contained within the NewOrg system are available to authorized users, providers and employers set up in NewOrg, or a user can manually key in email addresses on the fly.

SMS Texting

Adding to the robust existing mass email tool set built into the NewOrg Platform, organizations can extend their outreach to clients, donors and volunteers via NewOrg's SMS texting capabilities. Provide automated responses, updates, reminders, notifications, newsletters, and forms/survey links directly to your clients', volunteers' or donors' cell phones. Automating these processes can be quickly and easily implemented by your staff using sets of pre-existing templates built for your organization.

Bulk Email/Survey Tools

Generate bulk email from any report within the system targeting specific clients, (example: Parents with children under 10 looking to be informed of free hearing screening this month). NewOrg's survey manager allows users to attach custom surveys within your program and send them using bulk email system provided within NewOrg. Opened emails, bounced emails and forwarded email is also tracked within NewOrg's email system and a notification of the email is linked to all records the bulk email was sent.

NewOrg Messaging Center

Manage internal messaging with your colleagues, create custom groups to communicate with your team in NewOrg. Share contacts, events, forms, surveys, and print forms with other staff in an easy, quick way. Improve communication, administrative and operational tasks using NewOrg's internal messaging system.

Event Scheduling and Follow-up

NewOrg can generate follow-up events automatically that can be set in predefined intervals or selected manually using specific dates. These follow-up events can be activated within the system by creating program guided rules that assure the follow-up event is scheduled. Follow-up events will then be generated and added to the client and case managers' calendars. By providing this automatic workflow the NewOrg system reinforces the event scheduling process and allows your intakes to become a standard process. Follow-up events can also be attached to program groups and group members referencing work activities and target dates; when these groups events are finished, the event status can then be shown as a "completed".

Document Management

NewOrg provides an integrated document management system within the client management system. Team members can scan files or images and store them in a separate document management system, while linking these documents back to client and staff records. Documents can be tagged within the system based on expiration dates, document types, method of verification, and their physical location, all available directly from the client records.



Electronic Signatures

NewOrg supports the use of electronic signatures on pre-printed forms to distribute either in hard copy or electronically. Time-Date Stamps and be applied to the documents showing an accurate recording of the document publication. Multiple signatures can be added to these same forms and documents and can be stored in the NewOrg document management system and linked to any group or client record. Additionally, signed documents can be printed and give to clients for their own records.

Time Tracking:

NewOrg provides time tracking to any organization providing services to their client base. Client home visits, office visits, travel time, events or referrals can all be recorded down to the minute. Time based activities can be set up automatically or manually recorded by case and program managers. NewOrg offers the flexibility to break these events down to the most efficient metrics your organization is looking to track. Reviewing an entire case managements team daily/weekly or monthly schedules are all provided in NewOrg's event manager. Tracking activity type, group type, overtime, travel time, meetings are all available from within NewOrg's event management database and can be easily used to generate reports for your funders and board.

GEO Coding

NewOrg integrates with the Google Maps API, enabling in record verification of addresses and providing directions to assist in on-site case visits. Visual Maps and Google Street view are tied to the records address and can show everything from a Street level view of the area, to directions and identify location boundaries and crossover of zip codes as well

Record Notes and Alerts

NewOrg allows a note or alert to pop-up on any record tagged. By highlighting any potential unfinished intakes, missing records or general notes about the client or service being provided the alert will ensure the next person reviewing the record is notified. Time and date of the note or alert is highlighted in the record and the alert must be clicked on prior to entering the record.

Goals Tracking

NewOrg's goal tracking functionality allows case managers to specify goals the steps involved while also editing and tracking the progress of their plan, all goals tracking can be recorded and sent to NewOrg's reporting engine to show progress. Building customer case plans is easily accomplished using NewOrg. Case Managers can configure goals using drop down menu's, adjust target and completion dates, and provide goals, tasks and outcomes built up overtime to provide the most effective case plans for individual clients.

Outcomes Management

Outcome Management is a primary focus of measuring results in NewOrg. The level of sophistication on tracking outcomes is also becoming more burdensome on case management teams. Using NewOrg your team can track your outcomes by recording change resulting from your client's involvement with your program. An example would be a client, participating in a job training program receives an offer for full-time employment with benefits; another in the same program receives a temp position. Each outcome can be reported on a scaled basis providing the opportunity to assess your programs and provide more detailed reporting that your board and funders are beginning to require.

Approval Process

Mapping your organizations existing approval processes to the NewOrg System can enable an efficient and automated management of your existing approval structure. Approvals for emergency services, service provider authorizations, incident report reviews, time and expenses, can all be assigned to an approval process. This process can ensure that the required steps are followed prior to final approval. Whether these steps involve a group approval or a number of approvals in a process NewOrg can determine the process is complete prior to considering something approved. Once the process records have been approved the record can be locked down so they cannot be changed at a future date.



NewOrg Portal

Providing a web-based “front-end” solution to your case management system provides a highly effective way to reach out to your clients and service partners. By providing web-based forms for client intake forms, provider services referral and requests, volunteer forms and scheduling requests, NewOrg creates a way for your organization to provide self-service functionality to your constituents while also capturing the data into your existing system.

Integrated Video Conferencing

In this current environment of social distancing NewOrg has recognized the need for organizations to provide Services and conduct Client and Staff meetings remotely. The NewOrg platform now provides Integrated Video Conferencing to meet these challenges. Meet with your clients and staff members remotely via audio or video conferencing sharing while your computer or mobile device screen with the attendees.

- Video conference setup is easy and launches straight from events you have created in NewOrg.
- Multiple camera formats, and gallery views for all attendees.
- Share NewOrg assessments, surveys, and print forms, provide forms to client and obtain electronic signatures.
- Video conferencing participants can share and upload documents or picture of documents that can be prompted in meeting by the case managers and frontline staff.
- Documents uploaded in meeting can be saved in real time to the client record saving your staff time and ensuring documents are linked to the client’s record.
- Cut down on the time required to correspond with your clients via email.
- Reduce waiting time for key service document to be completed before services can begin.
- One simple meeting invite link to the “NewOrg Video Conferencing Center” for your contacts. This allows staff add invited to existing automated or manual email templates and texts to invite clients to attend the meeting, minimizing setup time.
- No 3rd party video contract.
- All meetings, file sharing and signatures are securely conducted and stored within your NewOrg System, HIPAA/PIPEDA compliant.

We appreciate your interest in NewOrg. If you are interested in discussing your current program needs or plans for future technology advancements. We are here to help. Contact us today!



Company overview:

NewOrg Management System, Inc. designs and develops outcome management systems for social services organizations and governmental agencies providing community services. NewOrg is a cloud-based, client management and reporting database that is professionally implemented to provide tailored turn-key solutions that support Case Management, Client Services, and Volunteer Programs; assisting staff, managers, and executives to track and attain progress towards targeted outcomes in employment, health and social services goals; and support services to children, families, the disabled, seniors, homeless populations, and communities. NewOrg also supports government agencies to realize wide ranging impact through their work with service providers, referral partners and other agencies; NewOrg allows social services organizations to spend less time on compliance and funder reporting, and focus on the delivery of services to their constituents. NewOrg Management System, Inc. serves nonprofits and public sector organizations worldwide. The company was founded in 2006 and is headquartered in Washington DC.



Toll Free: 1-866-843-2835 | Email: sales@neworg.com | Web: www.neworg.com

Certified



This company is committed to accountability, transparency, and continuous improvement.

Corporation

Important note: NewOrg respects confidentiality— all displayed screenshot contact records and service data are generated from anonymized test server data.