

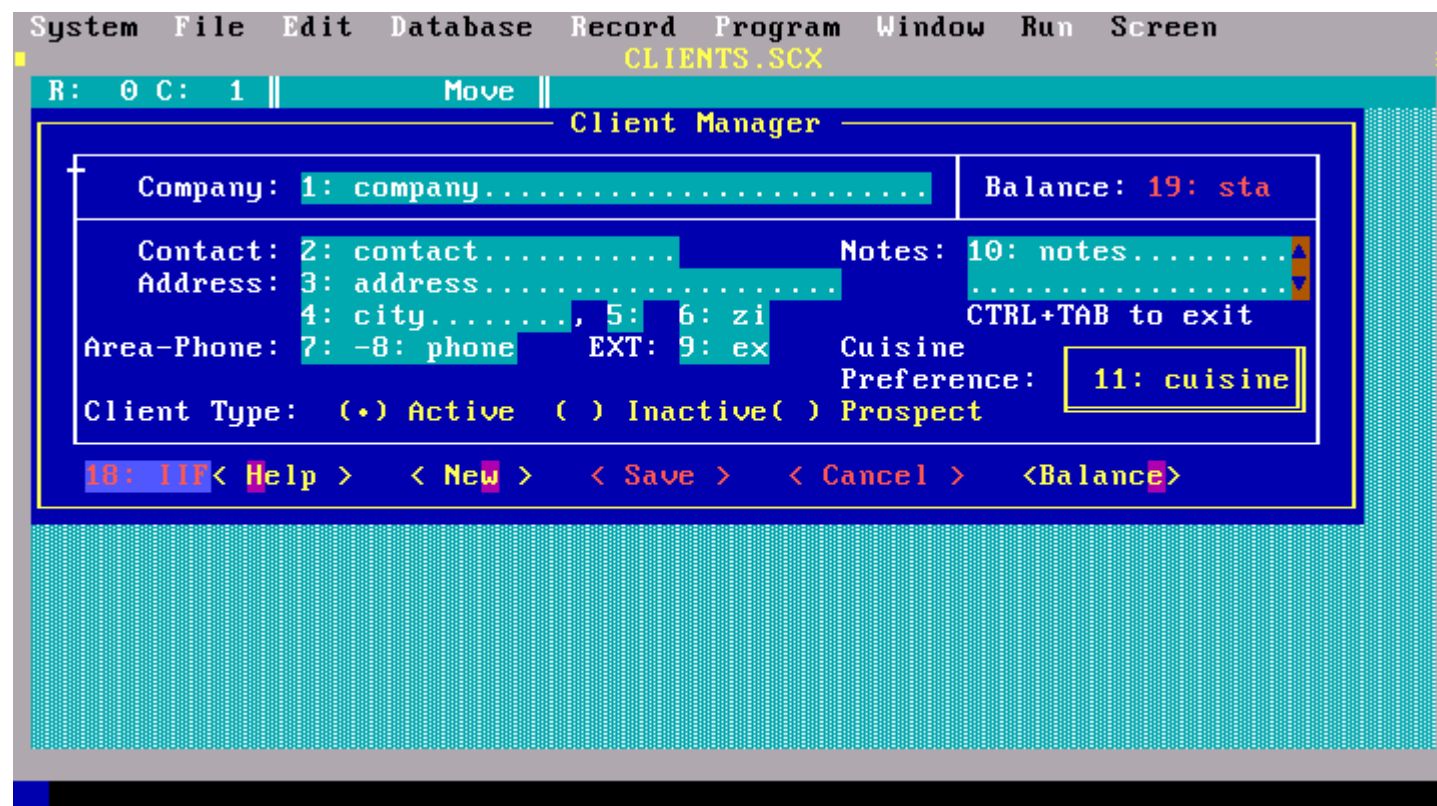
# CAT HERDING 101

OR HOW TO PICK A DATABASE EVERYONE AGREES ON



**Enlace Comunitario**

# WHY I LOVE DATA



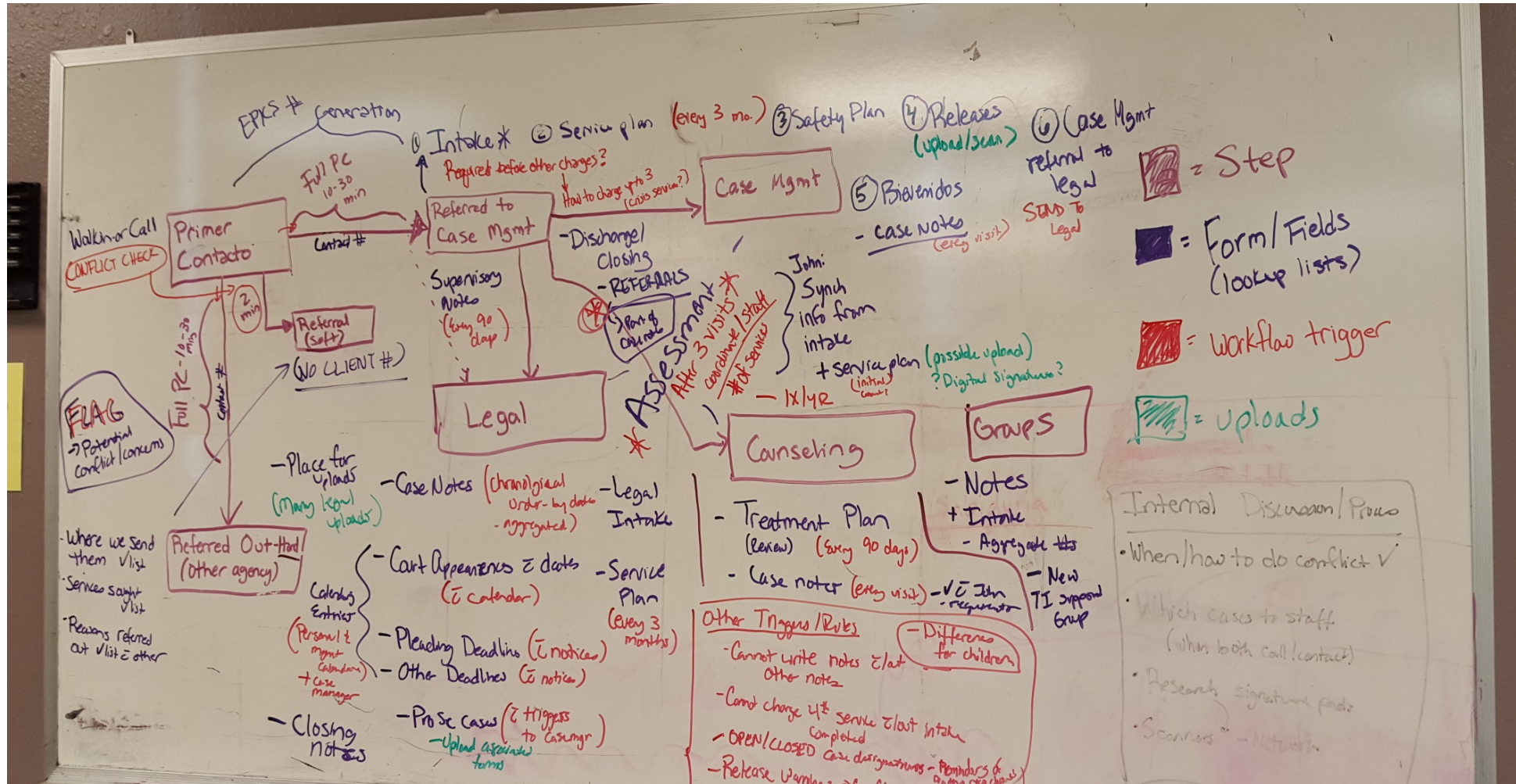
# WHAT DO WE NEED/WANT TO KNOW?



No Biggie...just, um, everything.

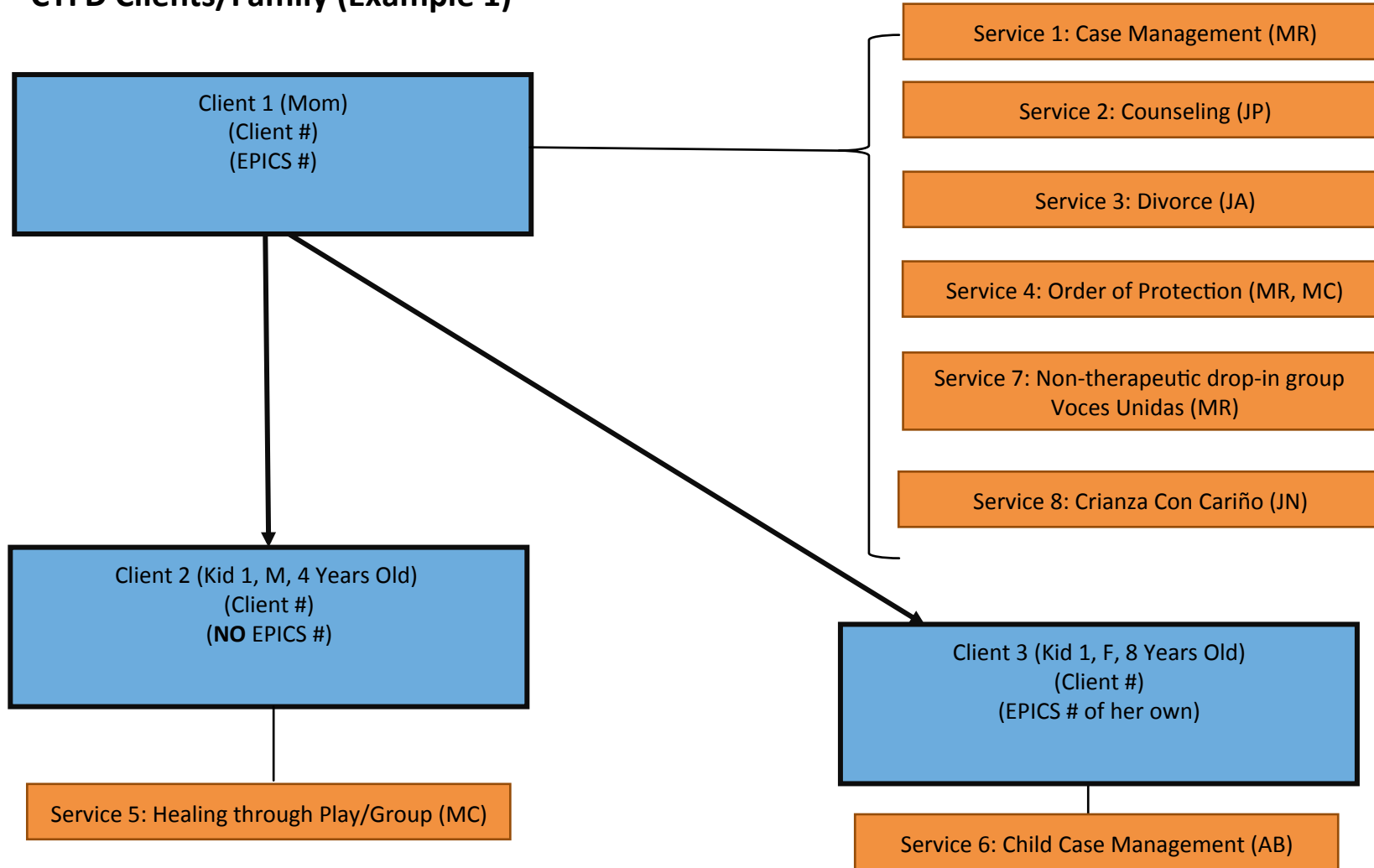


# WHAT THE \*\*%\* ARE WE DOING?



Date	Client Name	Client ID	New Intake	LA	Time	ADSP	Time	S&K	Time	Counseling	Time	DCLS	Time	SS Assess	Special Assess	Crisis	Time	Other	Time	Group	Time
3/1/2016	Jane Doe	261134		1.00	0.25																
3/2/2016	Staffing Meeting	Do not Charge																1.50			
3/2/2016	NM Law & Poverty	Do not Charge																1.50			
3/2/2016	Jane Doe	228915				1.00	1.50														
3/2/2016	Jane Doe	1015264				1.00	0.50														
3/3/2016	Maria Supervision	Do not Charge																0.50			
3/3/2016	Jane Doe	273644				1.00	0.50														
3/3/2016	Anahi Supervision	Do Not Charge																1.00			
3/3/2016	Jane Doe	Do Not Charge																			
3/3/2016	Jane Doe	119545				1.00	2.00														
3/3/2016	OVW Meeting	Do not Charge																2.00			
3/4/2016	Staffing Meeting	Do not Charge																1.50			
3/4/2016	Jane Doe	Do not Charge																			
3/4/2016	Jane Doe	1015264				1.00	1.00														
3/7/2016	Pathways	Do not Charge																0.50			
3/25/2016	Supervision Marta	Do not Charge																			
3/25/2016	Meet with Karina	Do not Charge																			
3/25/2016	Catholic Charities	Do not Charge																			
3/25/2016	Per Diem	Do not Charge																			
3/28/2016	Call Consulado	Do not Charge																			
3/28/2016	Walkin	Do not Charge																			
3/28/2016	Supervision Yadira	Do not Charge																			
3/28/2016	P O Box Follow Up	Do not Charge																			
			0.00	1.00	0.25	5.00	5.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.50	0.00	0.00	0.00

## CYFD Clients/Family (Example 1)



### Additional CYFD Billings/ Charges/Requirements:

- Primer Contacto
- Safety Plan
- Assessment
- (Non-billable) Surveys

# NEEDS

- Standardized/Normalized Data Entry
- Ease of Input
- Query-able
- Redacted Reporting
- Cloud-based
- HIPAA Compliant
- Customizable for Our Must-Have Processes
- Services and Clients Tracked Independently and Together
- And Much, Much More...



	Apricot for Human Services	Fam Care	CSM- Human Services Software	Client Trax	Merus Case
Website	<a href="http://www.socialsolutions.com">www.socialsolutions.com</a>	<a href="http://www.famcare.net/Home.aspx">http://www.famcare.net/Home.aspx</a>	<a href="http://unbouncepages.com/humanservices/">http://unbouncepages.com/humanservices/</a>	<a href="http://unbouncepages.com/clienttrax-human-services-software/">http://unbouncepages.com/clienttrax-human-services-software/</a>	<a href="http://meruscase.com">http://meruscase.com</a>
Phone	(443) 569-5856	(678) 965-6821	336-275-2832 Ext. 318	937-845-1076	510.550.5300
Contact Name	Charles Georgopolis	Scott Wold	Rodney Barnes	Paul J. Hanrahan, Steve Hurst	Brian Milanese
Customizable?	Yes	Yes	Yes	Yes	Not very
Standard Reports?	Yes	Yes - but not VOCA, VAWA	Yes, but can configure/customize	Yes, but they can configure/customize	Yes, can customize for \$1,000 each
Cloud-based?	Yes	Yes	can be or Yes	Yes	Yes
HIPAA compliant?	Pending	Yes	Yes	Yes	Yes
Numerous users (case managers)	Yes, but pay per license	Yes, but pay per license	Yes	Open to pricing, do NOT charge per user.	Yes, but pay per license
Legal? Time tracking?	Yes, with customization	Yes, with customization	Maybe	Yes, and customizable	Yes, primarily legal. Great time tracking
Costs?	For 25 licenses: Annual (1-year contract): \$10,238 Implementation: \$4,155 - \$7,110 If 5-year contract, annual rate: \$9,750	\$9,195/first year, \$7,995/second year +\$5,450 for fee-for-service billing/time feature (\$14,645/first year; \$13,445/second year) does not include training costs	By users, typically \$50/mo per user (in cloud) \$1500/mo x 12: \$18,000 plus set up ~\$1,000+ for setup and training (based on 30 users)	Implementation \$7,800; \$350/mo (\$4,200/year) training included in implementation costs	Price \$40/user month to month, \$30/user on annual contract plus about \$2000 setup, but less expensive than other legal software
Implementation Time?	3 months	45 - 90 days standard, can be less or more	30 days	Discovery period (2 days), configuration (45-90 days), plus onsite training (3-4 days)	30 days
Training?	Yes - online (included in setup cost); can come out and do in-person for added cost	Yes, off-site, extra cost	Online, not onsite	Online meetings, plus onsite training	Yes, can be on-site or online
Exportable access to all data?	Yes, but to Excel (CSV)	Yes	Yes, but charge	Yes - we would never, ever keep your data. It's your data	Yes
Backend	SQL	SQL	SQL	SQL	Unclear
Billing Component	Yes	Yes	Yes	Yes - flexible and robust	Yes
Scheduling Component?	Yes, to Google, but Outlook pending	Yes, with customization	Yes, but only internal	Yes - Outlook compatible	Yes - Outlook compatible



# DEMOS, AND MORE DEMOS



AND THE WINNER IS...



**ClientTrax**   
Service Management System

Quick Links

- ▶ [My Cases](#)
- ▶ [My Clients](#)
- ▶ [My Case Workers](#)
- ▶ [My Progress Notes](#)
- ▶ [My Tasks](#)
- ▶ [My Reports](#)
- ▶ [My Chart](#)
- ▶ [Create Person](#)
- ▶ [Search People](#)
- ▶ [Create Case](#)
- ▶ [Search Cases](#)
- ▶ [Export Data](#)

▶ Cases

▶ People

▶ Organizations

▶ Search

[Hurst, Steven](#)

## Welcome to ClientTrax!

General

Recent List

Notifications (5)

Jobs (0)

### Did You Know...

You can attach documents to a person from the 'Documents' tab on the 'Person Details' view.

### Actions

What would you like to do?

- [View a list of my cases](#)
- [View a list of my clients](#)
- [View a list of my case workers](#)
- [Search for a case](#)
- [Create a new case](#)
- [Search for a person](#)
- [Create a new person](#)
- [Search for an organization](#)
- [Create a new organization](#)

### Getting Started

New users are encouraged to review the [getting started](#) guide.

Quick Links

- My Cases
- My Clients
- My Progress Notes
- My Tasks
- Create Case

- Cases
- People
- Organizations
- Search

Hurst, Steven

Case Details

- General
- Services
- Key Dates
- Progress Notes
- Activities
- Documents
- Case Notes
- Relationships
- Clinical Items
- Assessments
- Flags
- Indicators
- History

- Sections
- General Information
- Aliases
- Note

General Information

This displays general information about the case.

Name Alternate Name  
Hurst, Steven Case ID

Type Category Priority  
Direct Advanced Normal

Start Date End Date Status  
1/1/2014 -- Active



















Branches/Providers  
Alliance Human Services

Actions

- Edit this information
- Change branches/providers
- View reports
- Delete this case
- Manage activities
- Set service rate defaults










People

These people are involved with this case.

Name	Role	
 Abigail Hines	Therapist	 
 Adam Jennings	Agency Staff/Educational Institute Staff	 
 Larry Smiths	Center Staff/Family Focus Supervisor	 
 Phillip Harris	Law Enforcement/Probation Officer	 
 Sabrina Hurst	Dependent	 
 Steven Hurst Jr	Client/Victim	 



## *Notes on the gentle art of herding cats*

-  1. *Cats don't like to be herded*  
(in fact, you can't really herd cats) 
  2. *Cats prefer to herd themselves*
  3.  *Cats understand that they sometimes need to be herded* (that doesn't make them any easier to herd)
  4.  *Cats don't like being reminded that they are being herded* 
  5. *Harsh herding has negative consequences*
  6.  *Herd gently, but firmly, with affection or fish as a reward* 
- Remember, you are a cat, too*  
*we all need herding, at one time or another*
- 

# CONTACT JULES

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**Enlace Comunitario**

Eliminando la Violencia Domestica

Eliminating Domestic Violence

