



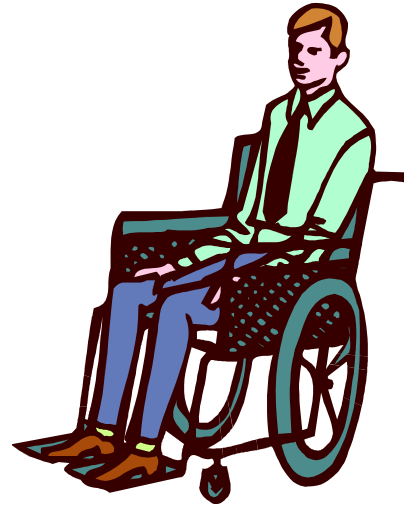
Support. Service. Success.

***Case Management:
How Patron Software Can Help***

CASE MANAGEMENT

Here's the scenario:

Your nonprofit organization services disabled individuals in the community by providing in-home visits by trained professionals. The first visit involves a complete evaluation of the individual's needs. Perhaps he/she needs help with monitoring blood pressure, or establishing a routine for taking prescribed medication, or counseling for depression. Once the needs assessment has been made, regular visits are scheduled.



Your major funding source, The United Community Foundation, underwrites your services. It requires each client to apply for benefits annually. Making sure that every client meets the deadline for re-approval can be a daunting task. However, with *Patron Software*, sending out reminder notices is just a few clicks away.

In order to continue receiving funding, your organization must submit statistical reports quarterly. When you are using *Patron Software*, recording and retrieving detailed demographic, medical and statistical information about each client is easy. In addition, you can schedule home visits, enroll clients in educational programs and maintain unlimited notes about each interaction.

Equipped with *Patron Software*, a laptop, and a satellite modem, your case workers can connect to your database from anywhere in the country. Information about in-home visits is always up-to-date and immediately available for review.

CASE MANAGEMENT

A new client, Lakesha Jackson, has been referred to your organization by Social Services.

Use the **Add a New Participant** form to register her.

In *Patron Software*, a record is like each client's file folder.

Begin by entering Lakesha's basic demographic information such as name, address, race, gender, family income, family configuration, birth date and marital status. You can also record who referred her to your organization.

The tabs on the *Patron Software* form are like pages within the client's file folder. Each page represents a particular type of information.

Add a New Participant

Title First Name Last Name Suffix
Name: Ms. Lakesha Jackson
 Check if the Participant is a Child

Category: Disabled Status: Active Referred By: Social Services

Membership Start Date: 7/1/2007 Expiration Date:

Demographics Guardians Emergency #'s Pick Up Work / School Medical Insurance Notes / Keywords / Transportation

Address: 1401 Pine Valley Rd.
City: Fairway State: AZ Zip Code: 85621-
County: Mesa
Home Phone: (540) 221-1584 Mobile: (540) 615-1888
Work Phone: Ext.:
Fax:
Email: lakesha@email.net

Permission to Release Photo
Birthdate: 7/31/1942
Gender: Female
Race: Black / African American
Marital Status: Widowed

Family Income: \$30,000 - \$35,000 Family Notes: Husband passed away in 1989. Lakesha lived alone until recently.
Family Configuration: Lives With Sister

Get Photo
Click on PHOTO to Zoom

Save Information

Exit

Click on each tab to continue entering more information about your client.

CASE MANAGEMENT

Demographics **Guardians** Emergency #'s Pick Up Work / School Medical Insurance Notes / Keywords /Transportation

Legal Guardian Info

	1.	2.
Relationship -->	Self	
Name (First, Last) -->		
Address -->		
City, State, Zip Code -->		
Home Phone -->		
Mobile -->		
Employer -->		
Work Phone -->		
Email -->		
OK to Contact at Work -->	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
	Same as Participant	Same as Participant

Legal Guardians

Demographics **Emergency #'s** Guardians Pick Up Work / School Medical Insurance Notes / Keywords /Transportation

Emergency Contact Info

	1.	2.
Relationship -->	Sister	Son
Name -->	Nichelle Torres	Alex Jackson
Address -->	1401 Pine Valley Rd.	891 Downtown Center Apt. 402
City, State, Zip Code -->	Fairway AZ 85621-	Washington DC 20015-
Home Phone -->	(540) 221-1584	(202) 677-2318
Work Phone -->	(540) 200-1000 Ext.:	(800) 301-4100 Ext.: 2214
Mobile -->		(202) 815-1008
	Same as Participant	Same as Participant

Emergency Contacts

Demographics Guardians Emergency #'s **Pick Up** Work / School Medical Insurance Notes / Keywords /Transportation

Employer: New Age Magazine
Occupation: Telemarketer

Check here if Participant is a Student

Grade / Level:
School:
Address:
City: State: Zip Code:
Phone #: Fax #:
Update School Info

Employer and/or School

CASE MANAGEMENT

Demographics Guardians Emergency #'s Pick Up Work / School **Medical** Insurance Notes / Keywords / Transportation

Currently Under Doctor's Care
Reason: Patient has diabetes and asthma

Check here if Participant is on Medication
Description: Insulin, inhaler, aspirin.

Check here if Participant has any Medical Allergies
Description:

Check here if Participant has any Food Allergies
Description: Peanuts.

Check here if Participant has any Restrictions
Description:

Check here if Participant has a Disability
Disability Type: Amputee
Description: Patient lost left foot due to diabetes.

Previous Diseases or Illnesses:

Convulsions Heart Problems Drug or Alcohol
 Diabetes Asthma

History of Violence Describe the History of Violence or Abuse:
 History of Abuse

Other Obesity

Medical History

Demographics Guardians Emergency #'s Pick Up Work / School **Medical** Insurance Notes / Keywords / Transportation

Preferred Hospital: Community Hospital

Preferred Physician: Dr. Jones

Address: 17 Medical Center Dr.

City, State, Zip: Fairway AZ 85621-

Phone: (540) 881-5000

Insurance Carrier: Medicaid

Insurance #: 559-14-2888

Notes on Participant's Medical Condition:
7/1/07 - Patient is currently 75 pounds overweight, but otherwise her medical condition is stable. Her mental state is good.

Additional Notes:
Patient indicates that she would be willing to participate in clinical trials for new medication and/or treatment.

Preferred Hospital, Physician and Insurance

Demographics Guardians Emergency #'s Pick Up Work / School **Medical** Insurance **Notes / Keywords / Transportation**

Notes:
The home is very clean and well-equipped.

Special Interests:
Lakesha volunteers at the Salvation Army Thrift Shop. She enjoys knitting.

Keywords:
Wheelchair

Check if Participant has Transportation
Transportation Method: Uses Public Transportation

Notes, Special Interests, Transportation and Keywords

CASE MANAGEMENT

After Lakesha's information has been entered, add the services that she will be receiving from your organizations.

Participant Benefits

Benefits Available for Jackson, Lakesha

Double-click on a Service to ADD it to the Participant's List of Benefits

- Chauffer Service
- Day Care
- Electrical
- In-home Counseling
- In-home Physical Therapy
- Lawn Mowing
- Meal Delivery
- Roof Repair
- Senior Day Care
- Yard Work

Double-click on a Service to REMOVE it from the Participant's List of Benefits

- Chauffer Service
- In-home Counseling
- In-home Physical Therapy
- Lawn Mowing
- Meal Delivery
- Yard Work

Add New Service Ok

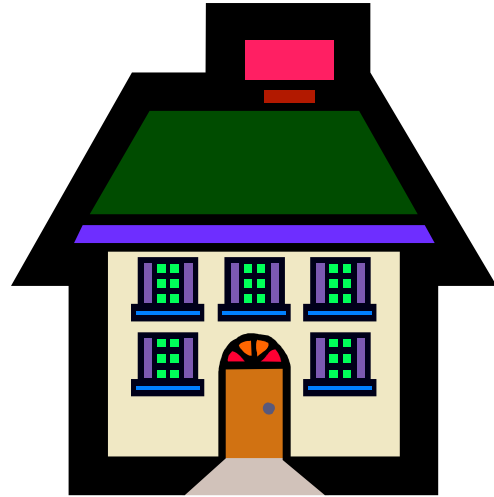
Exit



CASE MANAGEMENT

After all of Lakesha's information has been entered, schedule the first in-home visit.

Lakesha's case worker is Ann Rogers.



Use the **Add Participant History** form to document the results of the first visit.

Add PARTICIPANT HISTORY to 'Jackson, Lakesha'

Jackson, Lakesha
1401 Pine Valley Rd.

Date of Contact:

Time of Contact:

Who was Contacted:

Contact Method:

Outcome:

Contacted By:

Notes:

First In-home Visit:

Lakesha was referred to our organization after her left foot was amputated due to complications with her diabetes. Her vital signs were all within normal range. Lakesha has a positive attitude and is mentally alert and stable.

I recommend monthly in-home visits.

Lakesha would benefit from our class on nutrition and diabetes. I have enrolled her in the next class beginning Aug. 6.

She lives close to a bus stop and uses public transportation to get to her doctor's appointments.

CASE MANAGEMENT

Notice that the case worker recommended monthly in-home visits.

Use the **Calendar** form to set up the next six appointments. In your organization, each client is re-evaluated after six visits to ensure that his/her needs are being met.

Add Calendar Entry

Date: Click on ALL of the REPRESENTATIVES assigned to this task... At least ONE must be selected.

Time:

Recurrence: No Recurrence Daily Weekly Monthly Yearly

Enter recurrence frequency (up to 12):

Check here to follow-up on the completion of this task.

Check here if this calendar entry is a Pledge Reminder

Reminder Amount:

Total Pledge:

Entry Type:

Purpose:

Add New Representative

Name

- Jordan, Andrew
- Parrish, Chris
- Rhoades, Marvin
- Rogers, Ann
- Romanelli, Julia
- Sullivan, John
- Tutor, Life Skills

Contact Info | Notes / Keywords | Event / Program

Select Company, Donor Household, or Participant, then click on the one you want...

Company Donor Household Participant Clear Selection

Last Name	First Name	Street Address	City	State
Fisher	Addison	1552 Market St.	Hampstead	NC
Gallagher	Zachary	1554 Wildwood Drive	Wilmington	NC
Hinson	Jeff	330 Belvedere Drive	Concord	NC
Jackson	Lakesha	1401 Pine Valley Rd.	Fairway	AZ
Lorek	Kate	8 Southgate Circle, Apt. B	Anytown	VA
Lu	Qiang	917 East 4th St.	Leland	NC
Migliara	John	1 Main St	Anytown	VA
Morovsky	Irene	23 Barter Drive	Leland	NC
Nixon	Latasha	9716 Morgan Ave., Apt. 12	Leland	NC
Patel	Neel	1527 S. 20th St.	Fairway	VA

Go To:

Double-click on the Contact or Occupant...

Title: First: Last:

Position:

Contact Information

Home: Work: Ext:

Mobile 1: 2:

Fax 1: 2:

Email 1:

Email 2:

Preferred Contact Method:

CASE MANAGEMENT

With the **Lookup Calendar Records** form, you can confirm that the next six in-home visits have been scheduled for Lakesha Jackson.

Lookup Calendar Records

Lookup Category **Lookup Parameter**

Select Records that Match ALL Parameters
 Select Records that Match ANY Parameter
 Include Dates Prior to Today
 Display as List

Is Blank **Is NOT Blank**

Lookup Options

Create NEW Lookup
 ADD TO Current Lookup
 REMOVE FROM Current Lookup

Refresh Lookup Parameters
Clear Screen

Representative --> Rogers, Ann
Entry Type -->
Contact Name -->
Contact Method -->
Purpose -->
Category -->
Company Name -->
Family Name -->
Participant Name --> Jackson, Lakesha
Has Email -->
Keyword -->
Requires Follow Up -->
Task Completed -->
Task Past Due -->
Pledge Reminder -->
Event -->
Activity -->
Program -->
Class -->

Start **End**

Calendar Date -->
Completion Date -->

Exit

Next Steps...

Representative = Rogers, Ann AND Participant Name = Jackson, Lakesha

What do you want to do next?

Use the **Next Steps** form to generate a report, or export the scheduled information.

TIP: Many devices such as a Palm Pilot can import calendar entries directly from Excel or from a text file.

CASE MANAGEMENT

Community Outreach Opportunities, Inc. Calendar (Sorted by Date)

Representative = Rogers, Ann AND Participant Name = Jackson, Lakesha

<u>Representative / Purpose</u>	<u>Date/Time</u>	<u>Contact</u>	<u>Home / Work</u>	<u>Mobile</u>	<u>Email</u>
Rogers, Ann Routine Visit Program: In-Home Care	7/12/2007 10:00 AM	Jackson, Lakesha	(540) 221-1584	(540) 615-1888	lakesha@email.net
Rogers, Ann Routine Visit Program: In-Home Care	8/12/2007 10:00 AM	Jackson, Lakesha	(540) 221-1584	(540) 615-1888	lakesha@email.net
Rogers, Ann Routine Visit Program: In-Home Care	9/12/2007 10:00 AM	Jackson, Lakesha	(540) 221-1584	(540) 615-1888	lakesha@email.net
Rogers, Ann Routine Visit Program: In-Home Care	10/12/2007 10:00 AM	Jackson, Lakesha	(540) 221-1584	(540) 615-1888	lakesha@email.net
Rogers, Ann Routine Visit Program: In-Home Care	11/12/2007 10:00 AM	Jackson, Lakesha	(540) 221-1584	(540) 615-1888	lakesha@email.net
Rogers, Ann Routine Visit Program: In-Home Care	12/12/2007 10:00 AM	Jackson, Lakesha	(540) 221-1584	(540) 615-1888	lakesha@email.net

Grand Total: 6

After each visit, the case worker, Ann Rogers, links to *Patron Software* via a satellite modem connected to her laptop. With *Patron Software*'s unlimited notes feature, Ann can document all aspects of her visit with Lakesha. Over time, a complete picture of Lakesha's progress is captured.

One of the many benefits of maintaining records in *Patron Software* is that if Ann is unavailable and another case worker fills in for Ann, the new case worker has immediate access to Lakesha's history.

Although *Patron Software* is not a web-based application, any authorized *Patron Software* user can access the information from anywhere through a Virtual Private Network or a satellite connection.

Case workers no longer have to rely on file folders nor do they have to return to the office in order to update a client's records.

CASE MANAGEMENT

Below is an example of Lakesha's **History Report**. Notice that it is in descending date order so the most current visit is listed first.

Community Outreach Opportunities, Inc. History Report for Selected Participants 1/1/2007 - 12/31/2007

Jackson, Lakesha

1401 Pine Valley Rd.
Fairway, AZ 85621

<u>Date / Time</u>	<u>Contacted By</u>	<u>Contact Method</u>	<u>Contacted</u>
9/12/2007 10:00 AM	Rogers, Ann	In-home Visit	Lakesha

Notes: Lakesha has lost 10 pounds and is committed to losing 10 more this month.

She has found the class, Nutrition and You, to be very informative. She asked if her sister could be in the next available class because it's her sister who does most of the cooking. I told her I would find out and let her know later this week.

Lakesha has been researching prosthetic devices on the Internet and has asked if there are any organizations that provide prosthetics free of charge. I told her about our sister organization funded by the United Community Foundation. Lakesha is going to try and set up an appointment on her own, but I may need to give a referral.

8/12/2007 10:00 AM	Jordan, Andrew	In-home Visit	Lakesha
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Notes: Ann Rogers is the regularly assigned case worker, but is on vacation.

In following up with Ann's last monthly visit, I asked Lakesha if she is still having problems with headaches. She indicated that she was feeling much better. Her doctor prescribed a mild sedative which has helped her sleep better.

The new puppy is named Missy and has brought new energy to the household.

Lakesha attended her first class, Nutrition and You, and is motivated to lose weight by making better food choices.

7/12/2007 10:00 AM	Rogers, Ann	In-home Visit	Lakesha
-----------------------	-------------	---------------	---------

Notes: Lakesha's physician has prescribed a new blood pressure medication. She reports that she's been having headaches and is not sleeping well. I contacted her doctor's office and scheduled an appointment for next week.

Lakesha's son visited last week and gave her a puppy.

Her job is going well and overall her attitude is good.

6/12/2007 9:00 AM	Rogers, Ann	In-home Visit	Lakesha
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Notes: First In-home Visit:

Lakesha was referred to our organization after her left foot was amputated due to complications with her diabetes. Her vital signs were all within normal range. Lakesha has a positive attitude and is mentally alert and stable.

I recommend monthly in-home visits.

Lakesha would benefit from our class on nutrition and diabetes. I have enrolled her in the next class beginning Aug. 6.

She lives close to a bus stop and uses public transportation to get to her doctor's appointments.

CASE MANAGEMENT

With *Patron Software*, you can also track your client's participation in special programs.

For example, Lakesha was enrolled in Nutrition and You. If an upcoming event relating to nutrition is scheduled, you can easily find Lakesha, and all of the other students who attended Nutrition and You to let them know about it.

The screenshot displays the 'Lookup Participants' window in Patron Software. The search criteria are: Program = Health Care AND Class = Nutrition and You AND Location = City Center AND Start Date = 8/6/2007. The participant details for Ms. Lakesha Jackson are shown, including her category (Disabled), status (Active), and membership dates (7/1/2007 to 9/28/2007). The 'Class Info' tab is selected, showing a table of classes enrolled in:

Program	Class	Location	Start Date	End Date	Category	Desc
Health Care	Nutrition and You	City Center	8/6/2007	9/28/2007	Education	

The 'View Class Detail' window is open, providing more information about the 'Nutrition and You' class. It includes fields for Program (Health Care), Class (Nutrition and You), Location (City Center), Start Date (8/6/2007), End Date (9/28/2007), and Category (Education). The class is marked as 'Open' and has a description: 'Teaches patients about nutrition, weight and making healthy choices.' Funding sources include 'Healthy Start Foundation' and the instructor is 'Chuang Lee' with contact information (540) 819-5644 and chuang@email.com. The class was created on 7/7/2008 at 10:40:03 AM.

CASE MANAGEMENT

In *Patron Software*, keywords are used to identify, and group, people who have similar situations or conditions. For example, use the keyword “Hypertension” to identify each client who has high blood pressure. Or, use the keyword “Wheelchair” for individuals who require a wheelchair.

For instance, a specialist in prosthetics has offered to come to your organization and present the latest developments in prosthetic devices. You want to invite all of your clients who are amputees.

Use the **Lookup Participant Records** form to find all of your clients who are amputees.

Lookup Participant Records

Lookup Category **Lookup Parameter**

Select Records that Match ALL Parameters
 Select Records that Match ANY Parameter
 Display as List

Is Blank or Start Date or Low Range **Is NOT Blank or End Date or High Range**

Last Name --> [Dropdown]
Name --> [Dropdown]
Program --> [Dropdown]
Class --> [Dropdown]
Category --> [Dropdown]
Street Address --> [Dropdown]
City --> [Dropdown]
State --> [Dropdown]
Zip Code --> [Dropdown]
County --> [Dropdown]
Status --> [Dropdown]
Referred By --> [Dropdown]
Keyword --> Amputee
Has Email --> [Dropdown]
Family Configuration --> [Dropdown]

Lookup Options

Create NEW Lookup
 ADD TO Current Lookup
 REMOVE FROM Current Lookup

Refresh Lookup Parameters
Clear Screen

Lookup Members Keyword = Amputee

Member Name	Address	Phone / Work / Email	Send Email
Chen, Jonathan	880 Kirby Drive	(910) 788-6555	[Go To]
Chen, Sunny	880 Kirby Drive	(910) 788-6555	[Go To]
Dooley, Keith	766 Orchard Road	(710) 322-4567	[Go To]
Gallagher, Zachary	1554 Wildwood Drive	(910) 866-2222	[Go To]
Jackson, Lakesha	1401 Pine Valley Rd.	(540) 221-1584	[Go To]
Patel, Neela	15767 S. 23rd St.	(710) 342-7766 (710) 342-8674	[Go To]
Romero, Pedro	6765 Roseley Place	(710) 227-3824	[Go To]
	Anytown	38227- pedro@email.net	[Go To]

Patron Software found 48 clients who are amputees.

CASE MANAGEMENT

Next Steps...

Keyword = Amputee

What do you want to do next?

Run Reports & Mailing Labels
Create Mail/Merge Document
Export to Excel
Export to .txt File
Add to a Distribution List
Send Email

[Exit](#)

Now that you have found the people you want to invite, choose the best method for contacting them.

With *Patron Software*, you can generate a report that includes phone numbers if you want to make personal calls.

Or, you can create a mail merge document and send a personalized invitation.

Or, send each client an email.

The choice is up to you.

Community Outreach Opportunities, Inc. Participant Name and Address List Keyword = Amputee

<u>Name / Email</u>	<u>Address</u>	<u>Home / Mobile</u>
Chen, Jonathan	880 Kirby Drive Carolina Beach, NC 28428	(910) 788-6555
Chen, Sunny	880 Kirby Drive Carolina Beach, NC 28428	(910) 788-6555
Dooley, Keith	766 Orchard Road Hampstead, NC 24355	(710) 322-4567
Gallagher, Zachary	1554 Wildwood Drive Wilmington, NC 28402	(910) 866-2222
Jackson, Lakesha lakesha@email.net	1401 Pine Valley Rd. Fairway, AZ 85621	(540) 221-1584 (540) 615-1888
Patel, Neela neela@email.net	15767 S. 23rd St. Fairway, VA 38277	(710) 342-7766 (710) 342-4009

Contact Report

CASE MANAGEMENT

Patron Software provides tools so you can be proactive in helping your clients meet their annual eligibility requirements.

Rather than relying on the case worker's memory, sticky notes, or the clients themselves, use the list feature in *Patron Software* to dynamically compile a list of those whose benefits are about to expire. Use the Export to MS Word function to create a personalized reminder notice. As each client responds, remove his/her name from the list. This enables your organization to know which clients are about to lose their benefits.



CASE MANAGEMENT

Your funding source, United Community Foundation, has an oversight committee that monitors how organizations manage their grant awards. Each year, the committee sends you a list of questions that you are required to answer.

This year, the list includes the following:

1. How many clients does your organization serve?
2. List the number of clients by race, gender and age group.
3. What is the average household income?
4. What educational programs do you offer?
5. How many clients have participated in each program this year?

The list of questions goes on and on.

With *Patron Software*, all of your client records are kept in a secure and central location.

With the easy-to-use **Lookup** form, the answers to the above questions are just a few mouse clicks away. You no longer need to search through piles and piles of file folders. You can be confident that the answers you provide are accurate and up-to-date.



CASE MANAGEMENT

If you believe that *Patron Software* may be right for you, your staff and your organization, please contact us.

We will be happy to answer your questions about *Patron Software* and your record-keeping needs.

(877) 898-3981

info@patronsoftware.com

**Patron Software, Inc.
201 Lawton Circle
Wilmington, NC 28412**

Thank you!