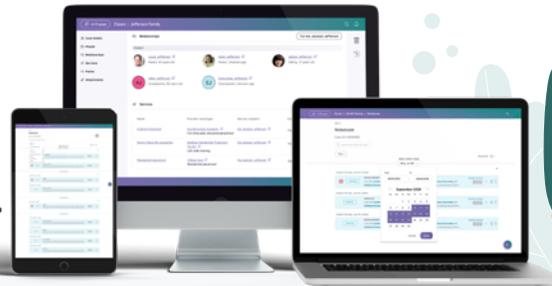




## The Casebook Platform

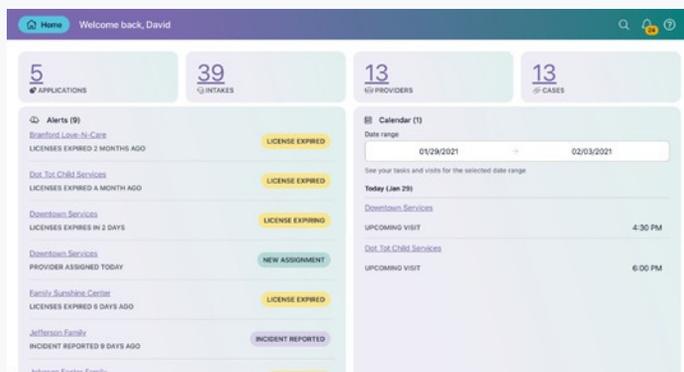
### Human & Social Services Solutions

Most information management software isn't made for human services; Casebook is built for human and social services professionals, and in collaboration with practitioners, so we understand the information you need to track and access on a daily basis, and we've based our entire platform around it.



## Working Together As One

Casebook includes all the platform modules



**Our platform is built to work like you do** - giving you the ability you switch gears to field a question about another case or write notes about an unplanned call, then jump back into the previous task without losing your place. Casebook's modular approach means you can configure which information is front and center, what alerts you want to receive, and effectively manage clients from intake, through service tracking or case management on a laptop, tablet or smartphone - anywhere you have a connection.

#### cb Access



Portal between organizations and clients, or other outside parties for forms, information, and documents.

#### cb Intake



No-wrong-door point of entry solution. Intake client info/service referrals, documentation, incident reports

#### cb Engage



Case management takes into account the need for better record keeping, mobility and security.

#### cb Track



Effectively manage and track provider licensing, tasks, files, documents, as well as paper and digital forms.

#### cb Report



View vital information and create robust reports quickly.

#### cb Admin



Powerful administration capabilities to assign user roles, permissions and create customizable forms, and more.



The Casebook Platform is configurable, mobile, and scaleable - to serve the smallest nonprofit or largest government agencies.



contact us

email: [info@casebook.net](mailto:info@casebook.net)

web: [Casebook.net](https://Casebook.net)

IS YOUR DATA  
HOLDING YOU BACK?

---

# Get To Know Casebook

**Work From Anywhere**  
**Report On Anything**  
**Go Live Quickly**

This isn't rocket  
science.

Use the Casebook  
platform to get the  
most out of YOUR  
data.

---

For more information, please visit:  
[www.casebooknet](http://www.casebooknet)

## **cb Admin**

User set up, Configurability to use your terminology, Form creation that's available immediately

## **cb Intake**

Create a new report and review all reports assigned to them in one place

## **cb Track**

Track the services/resources that you and other organizations provide

## **cb Engage**

Get a holistic view of your cases with resources, notes, and client activities all in one place

## **cb Reporting**

Design and use insightful reports to express data through visualizations and the ability to export and share that information

## **cb Access**

cb Access allows users to fill out forms and applications for providers and submit them electronically



# Let's compare Casebook & Others

Casebook	Other
 <p>Get up and running in a month (TTV)</p>	 <p>3 to 6 month implementation timeline on average</p>
 <p>Built for Human Services ; Configure ONLY what you need</p>	 <p>Complex functionality requires expensive developers</p>
 <p>Collect and Report on the data that matters to YOU</p>	 <p>Difficult to access data; limited to generic reporting</p>
 <p>Create powerful, custom forms to meet changing requirements</p>	 <p>Data in forms is unusable and form updates require custom development</p>