



R/Client Case Management Software

INTRODUCTION

R/Client, the most powerful and comprehensive software available to social service agencies, was designed by the staff of Great Lakes and a consortium of agencies to address the specific needs of a wide variety of social service agencies. With R/Client you can:

- Customize registration screens for six user-defined member types
- Manage cases
- Track all services provided
- Report on client demographics, services and all events
- Track incidents, referrals, and turnaways
- Monitor all scheduled education and training services
- Schedule services and all other staff activities
- Manage volunteers and personnel
- Define security levels for both groups and individual users
- Design outcome measurement tools and use them to monitor client progress toward defined objectives

WHY SELECT R/CLIENT

More Features

More features are found in R/Client than any other similar package. Features such as flexible age range reporting and the ability to report on multiple fiscal years for different funders led the National Victim Center to name R/Client a Promising Technology.

National User Base

R/Client is used extensively throughout the United States. R/Client installations are found in domestic violence, sexual assault, child advocacy, and client-witness programs in over 30 states.

Flexibility

Flexibility is at the heart of R/Client. As agency demands expand or change, R/Client can grow with you. With R/Client you can add new programs and services as needs dictate. Registration information can be customized to your needs and codes can be modified without the aid of a programmer.

Reporting for Multiple Funding Sources

Almost all other software packages produce reports for only one funding source, and agencies are forced to enter data for each funder into different databases. As you may already know, this can be a nightmare. R/Client accommodates *all* your reporting needs in *one* database.

Comprehensive Training and Support

We provide a full range of services to help you implement and utilize R/Client. These include on-site training, Great Lakes Training Institute, toll-free phone support, upgrades, customization, and consulting services. Our training and support services are backed by dedicated staff with extensive knowledge and expertise in the human services.



"... this is the best product I have found, and I researched A LOT! R/Client definitely gives you the most bang for your buck."

Executive Director, Michigan DV Agency

R/CLIENT FEATURES

FEATURE LIST	
BASIC	COMPREHENSIVE (All basic features plus)
Registration Case Management Service Tracking Rapid Registration Staff Assignment Volunteer Management Personnel Management Document Imaging Standard Reporting Advanced Security	Incidents Education & Training Referrals Turnaways Client Outcomes Report Writer

The following information describes the various features and functionality of R/Client. For more detail and to help you evaluate whether R/Client is right for you, please contact us to schedule a free online demo.

Registration

The Registration/Admission function allows an agency to quickly and efficiently capture important registration and demographic information. During the registration process, clients who have had a prior admission will be automatically flagged to allow important information to be immediately reviewed.

R/Client provides six separate user-defined registration screens for different client types. Extensive demographic information can be entered for each client type. You can customize your own registration screens to meet the unique needs of your agency.

Case Management

R/Client is organized around the case concept. A case is typically comprised of a client and one or more other members. For example, the most common DV case consists of a client, and offender, and one or more children. The typical child advocacy case consists of the child client, non-offending parent(s), and an offender. The individuals that comprise a case are considered members. The case structure shows the relationship of each member to the client and

provides the ability to group all members of a case together. This allows for easier tracking, case management, and service coordination.

Service Tracking

The services you provide to case members are at the core of R/Client. R/Client lets you define the services you want to record, and how you want to record them. Services may be added or modified as your needs change. Special features allow group services to be easily recorded, and produce group schedules and attendance rosters.

R/Client also allows you to record ancillary services like education and training, system advocacy, staff meetings, or anything else you desire. For agencies that provide residential services, like a shelter or group home, R/Client tracks entry and exit dates and provides daily census and other reports.



Rapid Registration

Rapid Registration was designed for programs like hotline or court-based protection order assistance programs, where there is a high volume of clients with relatively little biographic/demographic information. It combines the functions of registration and service entry and allows for the quick entry of multiple services for a client during a single encounter.

Turnaways

For those agencies with shelters or safe houses, clients and children who are turned away can be tracked, along with the reason for the turnaway.

The ability to track turnaways is a valuable aid in ensuring continuity of care for clients.

Incidents

R/Client allows you to capture and quickly view important information about incidents. An incident is a specific event that occurred, for example, a fight in a group home or an accidental injury. Since one client can have multiple incidents, it is easy to track incident-specific information such as weapon use, drug/alcohol involvement, etc. For each client, Incident information is categorized into three broad areas: incident report, injury/medical report, and police details.

Referrals

R/Client has the capacity to record information about referrals of clients or other case members. Referrals may be external—to other agencies, or internal to other programs within your own agency for service or follow-up. This feature improves tracking and case coordination.

Staff Assignments

R/Client allows clients and others to be assigned to staff at registration or anytime during the provision of services. R/Client allows assignment at the case, agency, and/or program level to for full flexibility in the case management process. Reports showing caseloads and client rosters by staff assist supervisors in the case management process.

Scheduling

The scheduling component of R/Client provides agencies with the ability to schedule both individual and group appointments for clients and other members. R/Client scheduling has an easy-to-use graphical interface with features that include finding open times for staff, viewing or browsing staff schedules, and schedule conflict checking.

Once an appointment is scheduled, no further recording is necessary unless there is a cancellation or no show. An automated feature quickly converts scheduled entries to client services. Reports include daily and weekly staff

schedules, schedules for a specific program and/or location, and a full organization calendar.

Document Imaging

This feature allows users to attach important documents to any R/Client screen and retrieve them at will. Documents available only on paper can be scanned using an inexpensive scanner to convert them to an electronic format. Attached documents may include compensation claim forms, police reports, protection orders, case notes, relevant photographs, custody orders, and any other electronic file.



Education and Training

An important function of all social service agencies is the provision of educational information about agency services to the community; and training to local professionals on client-specific issues. R/Client provides features to capture and report on critical aspects of education and training events including information about the requesting agency, audience characteristics, staff and materials, event registration, and evaluation.

Volunteer Management

Volunteers are a critical component of many non-profit agencies. R/Client provides the volunteer coordinator with the tools to greatly ease the tasks associated with volunteer management. Extensive information can be captured on current and prospective volunteers; and all volunteer services can be tracked. Scheduling information, such as when volunteers are available, along with a

volunteer skills database is a tremendous aid in finding the right volunteer for the right job

Personnel Management

R/Client includes a comprehensive personnel database to assist in the management and administration of all staff contained in the system. It includes demographic, job/position information, interests, skills, trainings and conferences attended, and awards received. Reports such as personnel rosters and data for EEOC compliance can be generated and assist greatly in agency personnel administration. For agencies with another personnel management system, only a minimal amount of staff data is required for R/Client.

Standard Reports

No matter how wonderful a system is at capturing important data, it is next to useless if you can't access key information quickly, easily, and reliably. With R/Client, when someone asks for a report, you won't have to say "You want it *when?*" R/Client includes powerful and flexible standard reporting capabilities that turn data and statistics into useful information. It is often no more difficult than pressing a few buttons; and requires no technical background to produce reports.

Users may view all reports on the screen, print them, and/or export them to Excel, where Excel's powerful tool set can be used to create pivot tables and colorful charts. The following categories of reports are provided:

- Census Reports
- Client/Member Rosters
- Service Reports
- Demographic Reports
- Event Reports
- Outcome Reports
- System Maintenance Reports

Report Writer

While we are very confident that R/Client's powerful standard reporting capability will provide the answer to the majority of your questions, we realize that at some time an agency may need to retrieve some

unique information not covered by standard reporting. The R/Client report writer allows you to create your own custom reports based upon your unique needs. It has an easy to use Quick Report Wizard that steps you through simple or complex queries. You can easily select data items, filters and sorting criteria; then format the report and output it to the screen, printer, or a file.



Client Outcomes

R/Client Outcomes allows agencies to define outcomes and measure client progress toward measurable goals. The Outcomes module allows each user to:

- Create an unlimited number of instruments (tests) with multiple different items and outcomes
- Define unique rating, binary (Yes/No), and numerical scales
- Record norms for each outcome
- Identify the rating source (e.g. client, staff, parent) for each administration
- Track multiple administrations (e.g. Initial, Intermediate, Discharge, Follow-up) of the same instrument and evaluate progress for each outcome.

A variety of reports are provided to track the administration of instruments, determine members' progress, evaluate individual items, and analyze outcomes by both demographic factors and services provided.

Security

R/Client contains advanced security features to protect the confidentiality of client information. A sophisticated password management system controls what information may be accessed by each

user. Security and administration is under the complete control of agency management.

SYSTEM REQUIREMENTS

Category	Minimum	Desirable
Machine	Pentium II/Celeron 200 Mhz	Pentium IV/1.0 GHz
RAM	64MB	256MB or greater
Operating System	Windows 95	Windows NT, 2000, or XP Professional (Not ME)
Disk space	250 MB	500 MB
Monitor Display	640 X 480	800 X 600 (17 inch)
Local Network	Any Windows- based network	Netware 5.X or higher, NT, or 2000 Server or higher
Wide Area Networks, VPNs,	Contact Great Lakes for requirements for your specific configurations	
Network card	Ethernet	Ethernet
Communications software	Internet connection/e-mail account	Internet connection/e-mail account
Printer	Any Windows supported printer	Any Windows supported laser printer
CD ROM	Required	Required

CUSTOMIZATION

R/Client is very flexible and designed so that it is customizable by the end users. However, some customization—new functionality, funder-specific reports, or adding a new screen may require custom programming. Great Lakes will provide cost estimates for any custom programming at no charge.

DEMONSTRATIONS

We encourage all agencies to view R/Client first-hand with a live demonstration, and see how R/Client can benefit you. Demonstrations are provided online for individual agencies or on-site for state-wide coalitions and groups. Please contact us to arrange a demonstration.

IMPLEMENTATION

When an agency purchases R/Client, we send a packet of implementation materials and assign a member of our training and support staff to be their "Implementation Coach." Working together, the coach leads an agency team through the extensive decision-making process of choosing which member types to use, designing screens, developing appropriate codes, and assuring that the final product will facilitate easy agency and funder reporting.



"Great Lakes staff spent hours with me on implementation materials. Sharon was very helpful and always pleasant. It was very clear she knows DV and R/Client cold".

Systems Administrator
DV Agency, New Jersey

TRAINING

Training is important both in getting started and at various times during the on-going use of R/Client. Training is especially critical during implementation, where the major focus is helping you set up R/Client to meet the specific needs of your agency. Our *Implementing R/Client* course shows you much more than which keys to press; and covers topics such as agency forms, reporting requirements, security issues, and other important information. We recommend four days of training to get you "up and running", with additional training later as you become more familiar with all of the R/Client

features and capabilities Great Lakes offers a variety of training options to meet your needs. These include:

Great Lakes Training Institute

A comprehensive set of R/Client courses are provided at our corporate headquarters in Pittsburgh, Pennsylvania. Courses are scheduled frequently throughout the year to ensure availability.

Onsite Training

Training can be provided on-site at your agency, and is customized to the needs of the agency. Any course provided by the R/Client Training Institute can be provided on site. Up to 12 staff may attend each course.

Online Training

Great Lakes offers regularly scheduled online training. These one hour mini-courses are a great way to keep up with the latest features and serve as a valuable aid in the training of new staff.

After initial implementation, agency-specific online training may be useful in the implementation of new features or for focusing staff on selected areas or needs.

"We loved our training experience... the trainer kept the pace going, had humor, and really knew the software."

Systems Administrator
DV Agency, Oregon



SUPPORT

The mission of our support department is to provide customers with quick, courteous and responsive assistance in the use of our products. We ensure that you receive the maximum benefits for the software you have purchased. Our support staff can provide you with the answers you need and the solutions you want via phone, fax or email. We offer a variety of support plans to choose from based upon your agency needs.

Periodic software upgrades are released. Many support plans include upgrades at no additional charge. They may also be purchased separately.



"Customer Support is the strongest advantage to R/Client and the Great Lakes team. They are terrific! Knowledgeable, friendly, responsive, prompt and concerned... all great qualities in a support team. We had some problems caused by OUR computer network system (not a Great Lakes product problem), and they worked extensively with us to solve even those issues so that we could fully utilize the R/Client program."

Executive Director
DV & Sexual Assault Agency, Michigan

ABOUT GREAT LAKES

Great Lakes Behavioral Research Institute was founded in 1977 to provide a broad range of information management and consulting services to the human service community. Our initial focus was research and evaluation. Over the years we have evolved into our current structure which includes over one-hundred talented and dedicated staff in two divisions, Technology and Professional Services & Consulting.

- **Technology Division**

Great Lakes' Technology Division develops, markets, and supports a variety of specialized PC-based software products for human service providers and government entities across the United States. Our products include client and case management software designed for a variety of organizations, including:

- Victim-serving agencies
- Criminal Justice organizations
- Mental health/Drug and alcohol agencies
- Early childhood and family agencies

Great Lakes is a recognized leader in human service technology and is committed to providing an affordable suite of cutting-edge solutions for our customers.

- **Professional Services & Consulting Division**

The Professional Services & Consulting Division provides a variety of services to governmental and non-profit entities. These include research and evaluation, financial management, case management, and employee recruitment and selection.



9515 Goehring Road
Cranberry Twp., PA 16066
Phone: (800) 965-4616 Fax: (412) 261-2459
E-Mail: info@greatlakesresearch.com