

Case Study

Helping a Large Nonprofit Streamline Case Management

Client: A large nonprofit and government partner serving families in court-ordered programs

Industry: Family Support Services / Social Services

Solution: Case Management Hub for digital form automation, multi-office coordination, and efficient reporting



The Challenge: Disconnected Offices & Manual Forms Slowing Down Services

This family-focused nonprofit supports families navigating court-ordered visits, parenting classes, and other critical services. With multiple offices and programs to manage, their team faced a major hurdle: coordinating staff efforts and maintaining consistent data tracking across locations.

Adding to the challenge, they relied on over 100 custom forms for intakes, assessments, and client interactions, all of which were paper-based or handled in disconnected systems. Reporting requirements were high, and duplicative data entry slowed things down while increasing the risk of errors.

The Solution: Centralized, Digital Case Management with Case Management Hub

To transform how they worked, the organization implemented Case Management Hub. Our cloud-based case management platform provided an all-in-one solution for their distributed team, giving them tools to digitize processes, enhance collaboration, and meet reporting standards.

Key capabilities included:

- **Form Automation & Custom Templates:** Over 100 existing forms were digitized and embedded into their workflow, reducing paperwork and improving consistency.
- **Cloud-Based Intakes & Assessments:** Staff can send and receive digital forms directly from client files...no printing or scanning required.
- **Custom Fields & Workflows:** The team customized the interface to match their unique data collection needs, ensuring they could track what matters most.
- **Integrated Reporting:** Data from forms feeds directly into reports, eliminating manual re-entry and increasing accuracy.
- **Support Services:** Case Management Hub provided hands-on support entering and configuring their forms, so their team could stay focused on client services.



The Results: Increased Efficiency, Accuracy & Team Coordination

By switching to Case Management Hub, the nonprofit significantly improved how they manage clients and services across offices.

Key Benefits:

- **Time Savings:** Automated workflows reduced time spent re-entering form data, freeing up staff to spend more time with clients.
- **Team Alignment:** All offices now access the same centralized system, improving collaboration and information sharing.

- **Professional Support:** The Case Management Hub team assisted with form setup and customization, easing the transition.
- **Better Reporting:** Custom, real-time reports are now easy to generate for internal use and government partners.



Looking Ahead: A Scalable Foundation for Family Impact

With Case Management Hub, the organization now has a scalable and modernized system to support their growing mission. Digitizing their case management tools has allowed them to improve service delivery, reduce administrative burden, and demonstrate the value of their work to partners and funders.

Social Work Portal's Case Management Hub team continues to support the organization with enhancements and expert services as they grow and evolve.