



# AIM Agency Information Management

3 Steps to Comprehensive Agency Information Management  
And Componentry Detail

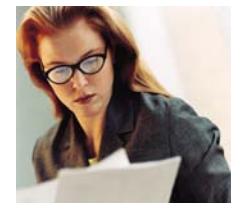




**Many agencies struggle against the demand for real-time information on their clients, their staff, and the widely divergent informational requirements of their operation.**

» *What Is Needed*

**Increasing regulatory pressure coupled with rapidly changing operational requirements create stress on the management structure for human service provider agencies.**



Procedures and processes that have been merely burdensome and labor intensive in the past become untenable in today's environment. Even those management practices that have worked well in the past come increasingly under pressure as the demand for higher levels of efficiency become more pronounced. Many agencies struggle against the demand for real-time information on their clients, their staff, and the widely divergent informational requirements of their operation. Service tracking, client demographics and management, billing, and a wide variety of operational data points often become scattered throughout the agency. Multiple instances of databases, spreadsheets, and both electronic and paper forms and documents become the norm. A cohesive, comprehensive view of the operational status of the enterprise becomes difficult and highly labor intensive to achieve, and in some instances - functionally impossible. What is needed is an enterprise-wide approach. What is needed is an approach that provides correctly architected, comprehensive and integrated data management while maintaining both ease of use and highly flexible user inputs and outputs to accommodate a rapidly changing environment. And any solution regardless of completeness and functional excellence must remain scalable, easily implementable, and possibly most importantly - affordable.

**"Our purpose is to help our clients and our people realize their aspirations."**

Paul Ingle



## » 3 Steps for a highly efficient enterprise



1. **Get Control of Operational Data**
2. **Streamline Data Management**
3. **Leverage Enhanced Data Management to Deploy Flexible, Agile, and Highly Efficient Operational Solutions.**

There are three important steps in mapping the creation of a highly efficient enterprise-wide information infrastructure for the human service provider agency. The AIM system packages the technology to support the agency in the successful implementation of all three. Every agency, to be efficient in today's rapidly changing operational environment must do three things: 1. Get Control of Operational Data 2. Streamline Data Management 3. Leverage Enhanced Data Management to Deploy Flexible, Agile, and Highly Efficient Operational Solutions.

Though every agency will face these three basic challenges in moving to a complete solution for their enterprise: not every agency will face the same specific requirements. The AIM system is modular in design and highly scalable to provide the exact solution for the task at hand. Any solution pack can be expanded at any time and each step of the overall solution can be implemented in a manner that provides the "best fit" for the enterprise. Both operational requirements and available resources can be accommodated in a single, integrated approach to providing the required solutions.

## » 1. Get Control of Operational Data



The heart of the AIM System is the DataSmart™ information infrastructure. The DataSmart approach utilizes ProCon™ middle ware utilities that have been deployed by organizations such as the city of Miami, Honda Corporation, Lincoln Reinsurance, and the city of Los Angeles to solve their data management requirements and aid in the integration of data between applications.

DataSmart™ provides the AIM system unprecedented scalability and interoperability allowing the platform to be mounted on virtually *any* hardware/OS topology. This means whether you implement the system on Unix servers, AS400's, or Intel/Windows platforms, the system will operate and look the same. You will never be tied to a particular operating environment – now or in the future - with the AIM system. Beyond the physical hardware platform, the AIM system can also use virtually any industry compliant database management system. You could select from Oracle, Informix, MSSQL, or any ODBC/SQL capable dataset. The system ships with a free database management system and can be changed at any time. One of the central design objectives of the AIM system is to offer freedom to the end user in constructing a total system that can leverage all current IT assets and offer maximum flexibility for the future.





## **DataSmart can easily accommodate extended data sets preserving linkages to clients, personnel, and all other key AIM data elements.**

In addition to these significant platform-based advantages, DataSmart™ offers tremendous flexibility in your agency's content. Though the AIM data library is extensive and continues to expand, the typical agency may well encounter specific data elements that are highly localized. Rather than require expensive custom programming to incorporate agency-specific data elements into the AIM system, DataSmart can easily accommodate extended data sets preserving linkages to clients, personnel, and all other key AIM data elements. These user-defined data elements are available to all functions of the AIM system including accessibility for reports through the AIM reporting functions. The AIM system has been carefully crafted to provide positive control of your organizational information requirements both now and in the future.

## **» 2. Streamline Data Management**

**Two core applications are built upon the DataSmart™ infrastructure that provide the power, flexibility, and ease of use inherent in the AIM system.**



Two core applications are built upon the DataSmart™ infrastructure that provide the power, flexibility, and ease of use inherent in the AIM system. These two applications concern themselves with the two major tasks of any information architecture: capturing enterprise data and maintaining integrity in this process; and getting data out of the system in a flexible, user-friendly manner. These basic functions (data input and output) are managed in a highly innovative design with two AIM information management engines:

CASPer (Core Applications for Service Providers with Enhanced Reporting)  
Excelerator Information Packager



» *CASPer (core applications for service providers with enhanced reporting)*



**CASPer provides a complete and extensible informational framework that will manage the core requirements of all operational data within the enterprise.**

CASPer provides a complete and extensible informational framework that will manage the core requirements of all operational data within the enterprise. Detailed surveys of available software packages, federal and state-based reporting requirements, and the operational practices of a wide variety of agencies have contributed to the extensive data library maintained by the CASPer system. Particular controls within the application can be “turned on or off” at any time, and even the content of drop-down controls, for example, can be edited during system design by the user. Data information tabs can be turned on or off or even added, and the system configuration – the “look” and content of the software - can be tailored to a particular user and follow their log-on whether they use the system locally or through remote access.

Agencies can determine which functions they require, and the sequence in which selected functions are implemented. From basic demographics, to advanced federal billing requirements and deep client/case management functions – AIM lets the agency focus on immediate identified processes while maintaining access to a single-architecture, comprehensive system that allows them to expand with control and confidence into the future.

Through the underlying DataSmart© architecture, CASPer also preserves easily crafted integration points to and from peripheral applications. Integration to General Ledger applications, for example, or Human Resource, or third-party billing applications, can be rapidly created using the ProCon© integration manager. Another important function of the CASPer system is its deep integration to the

Microsoft Office™ suite of applications. Appointments can be directly linked from the CASPer system to the Microsoft Outlook calendar; e-mail notifications of pending events can be automatically sent – created in CASPer and routed through the MS Outlook e-mail system. Reminders to staff and management can be configured to ring a cell-phone or message a remote pager; tasks can be noted and shared through the Outlook task manager – all managed automatically through the CASPer system. Through the Information Packaging technology – even information portals can be opened remotely via hand-held pda’s, laptops, and other remote devices. AIM provides a host implementation options to ensure that your technology will provide real-world solutions for your real-world challenges.





## **Excelerator Information Packager** **...advanced reports, conduits, and information flow processor for strategic data applications.**

The report manager that ships with the DataSmart™ enterprise platforms, the CASPer™ Agency Management, and the BestCase™ Case Management toolsets is designed to rely upon and closely integrate with the functions and use of Microsoft Excel™. This design choice opens a wide range of possibilities for the use of your centralized data libraries and optimizes the processes employed within the enterprise. Far beyond the scope of conventional report writers.

### » **Excelerator**

**Excelerator employs Excel workbooks as information packages that can be used as distributed data modules throughout an enterprise.**



Excelerator employs Excel workbooks as information packages that can be used as distributed data modules throughout an enterprise. Software functions that reside within a conventional user interface can be detached and reposed in a spreadsheet. That spreadsheet can then be easily moved to a handheld device, a laptop, or even printed as a paper form which mirrors conventional "paper-based" systems. The paper form can be re-entered into the workbook and "checked" in to the system and the originating function. Progress notes, for example, could be created on the system as a blank form, "checked-out" as a spreadsheet, moved to a laptop, pda, or emailed for completion. Completed spreadsheets can then at anytime be "checked in" which allow admission of information to the system in the same manner as if it were entered directly through the user interface. This process allows an enterprise tremendous flexibility in the manner in which information flow is tracked and promoted. Even hardware or communications limitations can be addressed through the flexibility that

Excelerator offers as the bridge between your operations and your data. As a report designer, Excelerator provides unprecedented flexibility in the creation and use of reports. Reports become interactive and easily available for detailed analysis as formula and additional workbook sheets can be added directly to a compiled report. The density of detail that can be included in an Excelerator report also exceeds that of traditional reporting methods. Outlining, hidden cells, explanatory notes, and all the functions of Excel can be included in your reports including graphics and charts.



### » *3. Leverage Infrastructure to deploy efficient management functions*



**The AIM system is designed as a comprehensive infrastructure to support the information demands of today's human service provider agency.**

The AIM system is designed as a comprehensive infrastructure to support the information demands of today's human service provider agency. The approach has been to move away from a closed, vendor-centric design and create an architecture that will work with any number of third-party applications. Though AIM can provide all of the tools necessary to manage your enterprise data requirements – any number of third-party tools can access and manipulate AIM data structures. Crystal Reports™, for example, SQL based query processors, and any number of front-end applications can be linked to the underlying AIM system. Both ProCon and Excelerator provide easily configurable and highly flexible portals into and out of the AIM system. Linkages to most third party payroll, general ledger, human resource, and case management systems can be readily created using the tools included in the AIM system. ProCon and Excelerator, in fact, can be used together to combine information from AIM and other applications into a single report!

### » *BestCase™ Management application*



**BestCase™ provides a highly configurable case management system for agencies supporting Early Childhood, Mental Health, and Developmentally Disadvantaged clients.**

While a number of peripheral applications are under development, the main application currently offered under the AIM system is the BestCase™ Case Management application. Future integrations will include applications for billing, time and attendance, and integration to the Verify™ system providing fingerprint recognition technology for a host of security and verification applications.

BestCase™ provides a highly configurable case management system for agencies supporting Early Childhood, Mental Health, and Developmentally Disadvantaged clients.





**Complete support for all client functions including medications, incident reporting, employment tracking, subsidized transportation, benefit tracking, diagnoses and disability assessments, configurable assessment tools, and highly detailed management of all related functions are included.**

» *Complete Support*



Complete support for all client functions including medications, incident reporting, employment tracking, subsidized transportation, benefit tracking, diagnoses and disability assessments, configurable assessment tools, and highly detailed management of all related functions are included. Service plans, goal-objective-progress management, and all evaluation criteria are supported. Complete billing information is integrated into the service delivery system providing for positive control of all requirements for Medicare/Medicaid fee-for-service billing including the managed, by-client view of required assessments, specific goal types, funding source/provider credentialing, service location management, and outcome tracking. Coupled with the Excelerator Information Packager, virtually any form library currently used for client assessment and service delivery can be implemented and automated. This capacity is unmatched in the industry and allows the agency to leverage their most important asset: the knowledge base of their staff. With this ability, AIM allows the agency to create a seamless integration of current, proven service processes with a comprehensive technology infrastructure to solve the most difficult information management challenges.

While the rapidly changing landscape of federal and state regulatory requirements, billing methodologies, funding sources, and service delivery systems create constant challenges for today's human service provider agency – there remain 3 crucial steps to hitting the mark in gaining positive control of agency information management. With uncertainty becoming perhaps the most certain attribute of the current operating environment, and the pace of change continually increasing – comprehensive management system solutions move from the category of luxury to necessity.

If your agency is evaluating technology solutions we invite you to contact us for a detailed assessment of how the AIM system might fit your enterprise requirements.

We know that agency management has become a process of hitting ever faster moving targets. Let us show you how we can help.



## ➤ *Componentry Detail*



### **Fee-For-Service Billing**

CASPer was designed in conjunction with agencies actively engaged in a review of their internal processes specifically with regard to fee-for-service. National consultants were engaged to help chart the course and today, CASPer offers complete automation of what has been termed “the golden thread” of accountability in the service delivery process.

### **Time and Attendance**

Rate Tracking (piece/hourly, Activity Tracking)

### **Client Notes**

Free form client notes, Spelling check/email capacity built in.

### **Maintenance, ICF/CILA**

Tracking scheduled maintenance/building programs, Integration to event management system, Residential facility management, All required reporting supported, Safety checks, Drill logs, Disaster preparedness report, Facility inspections.



### **Employment Tracking**

Management of community employers, Track hours/pay rate/job descriptions, Ad hoc reporting of clients by employer.

### **Human Resources**

Customizable client “views” Orientation, Job application tracking, CEU compliance, Customizable roles, Personnel position indicators.

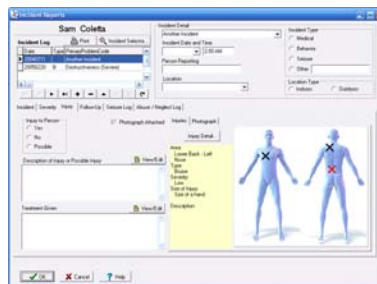
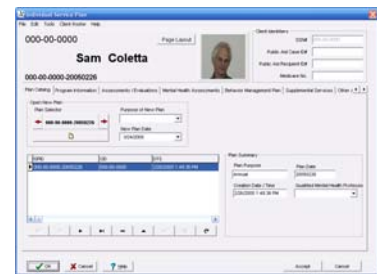




## › Componentry Detail *Continued*

### Service/Treatment Plans

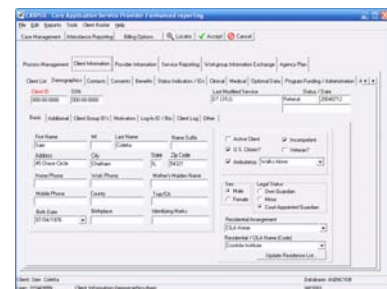
Complete and flexible assessment management, Goals/objectives/progress note catalogs, complete support for fee-for-service billing, automated creation of monthly summaries, service outcome tracking, committee case management (eg. Rights Review Committee).



**Incident Reporting**  
Complete Integration.  
Injury reporting,  
Seizure reports,  
Abuse reports,  
neglect.

### Demographics

Complete Data Dictionary, Single Architecture Solution, Extensible and configurable data collection, Motivators/pictures/narrative data/custom views, Client login for access to personal information including guardianship and consent logs.





## ➤ *Componentry Detail Continued*



### **Medial Information**

Medications, therapies, adaptive equipment tracking, Medicare Part D tracking, Medication error tracking, healthcare evaluations/scheduling/ follow-up, Board Certified Psychiatric evaluations, Routine medical checks, Hospitalization/Illness tracking, Vaccination/Immunization tracking, Emergency medical Information.

### **Client Benefits**

Complete Tracking of all client benefits, Benefit editor to create new benefit management modules, Complete catalog of benefit trackers.

### **Document Management**

Full support for documents of any format (pdf, doc, xls, tif, jpg, etc.) Track and catalog client documents.

### **Event Management**

Integration to Microsoft Office time management, Automated email notification of events, Event queries by action type, supervisor, clinician, client, etc., Automatic compiling and transmittal of custom reports, Automatic "triggers" create notification of user defined events.



### **Fleet Management**

Asset Management, Maintenance calendar interfaced to event management, Trip logs, Inspection logs.

### **Intake Management**

Track billable intake activities, Waiting lists and service histories.



## » *Componentry Detail Continued*

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### **Fundraising Development**

Complete management of all development activities including donor and volunteer programs. Distribution lists, content management, mailing lists and more.

### **Behavior Tracking**

Complete management of behavior tracking including custom form development, tabulation, and customizable graphing.

### **Client Scheduling**

Capacity to manage all activities and easily manage client schedules.



### **Workgroup Administration**

Customizable job checklists by shift, Specialized work

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### **Clinical Tracking**

Complete Assessment tracking, DSM Axis Evaluations, Diagnosis Tracking, Behavior Management Plans.

### **Service Catalog Tracking**

Complete support for all fee-for-service requirements, Monitor and audit services authorized vs. Performed, View progress notes by service.



533 Sheridan Road  
Petersburg, IL 62675  
Phone: 217-632-3066  
[www.qscorpio.com](http://www.qscorpio.com)  
Email us at [Info@qscorpio.com](mailto:Info@qscorpio.com)