



## CaseWorthy's Energy Assistance

“ Partnering with CaseWorthy has resulted in streamlined LIHEAP processes. When a client applies for energy assistance, our organizations can enter their information into CaseWorthy, calculate their benefit, and submit it for payment within moments. With 7.0 analytics, we can dive deeper into LIHEAP data, and work toward helping our low-income families even more effectively. ”

– Tawnya Clark, Implementation Team Leader,  
Community Action Partnership of Idaho

### Helping families pay their energy bills

No one should have to choose between staying warm and having enough to eat. Yet, close to 14 million American households are behind in utility payments and 2.2 million face shut offs each year.<sup>1</sup> Your job is to help ease this burden for those in need.

The success of your energy assistance program hinges on your ability to manage a wealth of information, plus accurately track the services and funding being provided for each customer. No simple task.

That's why CaseWorthy has created the proven technology to help you effectively handle all of these components and more, in a single solution. You'll be able to set up your specific energy assistance programs and services, define eligibility rules, and create customized workflows for intakes, approvals, and more. Capture and manage required client data, assessments, and required documents in one, secure place.

The best part? Our dedicated compliance team stays on top of all data and security requirements so you can focus on your customers.

### Features & Capabilities

Here is just a handful of the features and capabilities you get with this single-stop software platform from CaseWorthy:

#### Intake Assessments

Thanks to our apBuilder™ development toolkit, you can completely customize any of your intake assessments – needs, financial, or anything else – by adding or removing data fields. You also have the ability to set up as many intake workflows as you want. Simply define all the steps in any multi-step process you want, to ensure that all necessary client data is captured. By mapping the relevant assessment to the appropriate workflow, you'll take the guesswork out of which one you need – bringing more efficiency to your entire intake process.

#### Eligibility

Easily set up eligibility rules as well as timelines to specify how often assistance will be provided in a year for natural gas, propane and utilities. You can also put financial caps on amounts to be paid out. Based on the pre-determined eligibility criteria you create, the system will automatically match clients with the energy assistance programs and services for which they qualify.

**877-347-0877**

fax: 801-207-8350 | 3995 S 700 E #420, Salt Lake City, UT 84107

## Features & Capabilities

### Approvals

CaseWorthy has you covered when it comes to the many different types of approval processes you may have in place – emergency service requests, service authorizations, provider contracts, and more. Assign steps in your approval workflows to include individuals, teams, an approval hierarchy, and even the minimum number of authorizations required before a request is approved. You can then lock down approved transactions so they can't be changed at a later date.

### Service Tracking

A variety of manual and automated tracking options are available to you, depending on what you need for any given activity. Keep an eye on services provided and account balances, as well as all funding sources at an individual or collective level. Record the number of hours a case manager has worked in a day, whether classified as regular or overtime. Automatically track how much time it takes to complete employee tasks like client intakes for a better understanding of staff productivity.

### Document Management

Capture and organize all required client data and documents in one place – assessments, proof of income, utility bills, program enrollments, funding, and more. You'll be able to request services for eligible clients, set annual budgets, and monitor account balances – all in real time. Because all client intake data and documentation is stored and managed in a central database, you can be confident that everyone is working from the same set of data for improved accuracy and efficiency.

## Benefits

### Ensure Responsible Fund & Resource Allocation

A panoramic 360° view of each client, the services being provided, and funds allocated ensures deeper accountability and transparency.

### Streamline Day-to-day Operations

The ability to automate workflows means that all required information is collected and each step is completed in the right order, boosting overall efficiency and speed.

### Meet Compliance Requirements

Drill down into the real-time details you want to see – assessments, approvals, who's enrolled or exited your energy assistance programs – to ensure you're fulfilling all eligibility and compliance requirements.

### Why CaseWorthy?

Every business benefits from smart alliances. When you team up with CaseWorthy, you get a comprehensive solution to help you securely capture data AND meet all security and compliance requirements. Plus, we provide the expertise and experience you need to successfully manage your customized case management solution from planning to implementation.

*Some 14 million households are behind in utility payments. 2.2 million households face utility shutoffs every year. <sup>1</sup>*

<sup>1</sup> Reames, Tony G., "Improving the Effectiveness of Federal Energy Assistance for Low-Income Households," Scholars Strategy Network, <http://www.scholarsstrategynetwork.org/brief/improving-effectiveness-federal-energy-assistance-low-income-households>

*In 2015, roughly 6 million households received help to pay for heating costs through LIHEAP. <sup>2</sup>*

<sup>2</sup> LIHEAP Fact Sheet, March 16, 2017. <https://www.acf.hhs.gov/ocs/resource/liheap-fact-sheet-0>

To learn more about how a complete case management solution can benefit your energy assistance programs, contact CaseWorthy at

**877-347-0877**

or visit  
**[www.CaseWorthy.com](http://www.CaseWorthy.com)**