BIBLIOGRAPHY OF SOFTWARE
FOR
INFORMATION AND REFERRAL
PROGRAMS

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Prepared by
National Aging I&R Support Center

National Association of State Units on Aging

September 2000

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INTRODUCTION

The National Aging I&R Support Center first published this bibliography in 1999 in response to the many inquiries we received for information about software for I&R programs. This 2000 revision of the original bibliography includes several new products and updated information about products included in 1999.

The bibliography, while comprehensive, is by no means all-inclusive. New products enter the market with regularity and existing products are updated as the technology continues to expand and improve. If you are aware of software that we have not included, please let us know. We hope to continue to update the bibliography on a regular basis so that it will continue to be useful for state units on aging, area agencies on aging, local aging I&R service providers and others.

In preparing this bibliography our goal is to allow for product comparison by providing the same basic information on each software program. Each listing generally includes information on software features, systems requirements and cost. Please contact the distributor directly for additional information.

When we distributed the first edition of this bibliography we invited programs experienced with a particular software package to let us know how they liked it. We solicited their comments about product strengths and weaknesses, the quality of technical support and whether or not they would recommend the product. We received a number of responses which we would be happy to share. Contact Greg Case at the National Aging I&R Support Center for more information.

Please note that at the back of this bibliography there are three forms. One solicits your comments about software you may have used, another asks for information about software we may have inadvertently left out of the bibliography and the third solicits information about customized software. We'll appreciate your efforts to complete the appropriate form(s) and return them to the Support Center. Your assistance in keeping this document updated is greatly appreciated.

Finally, please note that the inclusion or exclusion of software in this bibliography does not constitute endorsement or non-endorsement of a product.

National Aging I&R Support Center
National Association of State Units on Aging
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AIM I&R – Saber Corporation

> 314 Oakland Ave.
> Rock Hill, SC 29730
> (888) 373-2090
> www.sabersite.com

Advanced Information Manager (AIM) I&R is a comprehensive data management system designed for I&R/A programs. AIM can be used by a single agency or as part of a larger group that shares information. AIM I&R results from years of working with the aging network provider market.

AIM features: search by keyword, service area, taxonomy, or any field in the provider set-up screen; each involved agency can add and update the information in records they originally created; transportation module; pre-programmed reports to meet a variety of needs including NAPIS; freedom to build additional queries or reports as needed; comes as a part of the AIM Suite which includes AIM Client Management System and AIM Remote. AIM Remote allows you to send your AIM data to remote locations.

Saber Corporation has a web site with fairly detailed information about this product. The Web site includes an online manuals and detailed pricing information.

System requirements: IBM PC or compatible 486-66 with 16 Mb of RAM and 80 Mb of available hard-disk space. Microsoft Windows 95, 98 or NT and SVGA or higher resolution monitor and video card.

Cost: The AIM suite (includes AIM Client Management, AIM Remote, and AIM I&R) is $795 per copy.   The initial purchase of the AIM I&R System comes with their Premium Maintenance Agreement which includes toll-free access to technical support staff and all core program upgrades and enhancements.

ALLIANCE NETWORK – Alliance Systems

> 873 Embarcadero Dr., #5
> El Dorado Hills, CA 95762
> (888) 395-1274
> www.allsysnet.com

Alliance Network is an information and referral software system designed for I&R/A organizations ranging from single location operations to statewide or nationwide collaborative groups.

Alliance Network features: taxonomy, keyword, agency, site and program searches; multiple simultaneous service searches; supports AIRS/InfoLine Taxonomy; client and call tracking; case management (late fall 2000); user defined call/client data sheets for specific programs or data collection; unmet need and follow-up action; statistical reports;

developed with Microsoft Visual Basic 6.) and Access 2000; data is open to third party tools such as statistics packages and report writers; automatic directory production.

The PC system interfaces with the Alliance Network Resource Web Browser and the ReferWeb product from RTM Designs to provide Web access to your resource database.

Alliance Systems offers on site training for Alliance Network. Training sessions are typically 3 days, covering all aspects of the program.

System requirements: Minimum requirements for single user are Pentium 200 MHz PC, 32 meg RAM (or more), 150 Mb free disk space, SVGA Monitor, and Windows 95/98/2000. Recommended requirements for multi-user LAN are Pentium 200 MHz (or greater), 96 meg RAM (or more), 300 Mb free disk space and Windows NT or Novell.

Cost: The Alliance Network PC system is available on an annual subscription basis with no up-front purchase price. The annual subscription fee is $400 for single users and $750 for multi users. The system may also be purchased at a cost of $1,250 for single users and $2,500 for multi users.

A.R.I.E.S. – Matney Consultants, Inc.
525 South Church Street
Asheboro, NC 27203
(336) 629-4158
pat@matney.net
www.matney.net/aries.htm

A.R.I.E.S., Automated Referral Information Enhancement System, is software designed to record information calls, referrals, and client information for a human service agency.

A.R.I.E.S. features: easy to use menu interface; records routine and client caller information along with referrals; client confidentiality options; can search by Taxonomy Codes, keywords, agencies with specific services, and geographic areas; easy to use format allows user to create individualized databases of services and agencies; detailed agency/service database; creates form letters; and generates reports based on referrals, services, callers and agencies.

A demo can be downloaded from their Web site.

System requirements: DOS 5.0 or higher; minimum of 4 Mb of RAM for the DOS version and 8 Mb RAM for Windows; 5 Mb free on hard drive; color VGA graphics board.

Cost: The multi-user version starts at $1,995 for 5 users. Installation and training is extra at a rate of $120 per hour not including travel if required. Contact Matney Consultants for more detailed information.

BEACON I&R – Synergy Software Technologies Inc.
159 Pearl Street
Essex Junction, VT 05452
800-294-8514, ext. 1
jbyer@synergysw.com
www.synergysw.com

Beacon I&R is part of Synergy's fully integrated suite of social service software solutions, allowing for single-point-of-entry data management across organizations.

Beacon I&R features: complete integration with Synergy's client management, assessment, outcome measures, etc. software suite; fast client and resource searches; searches by county, city, zip code, partial program name, service(s) provided, key words, AKA; allows use of full AIRS taxonomy; ability for user to enter & maintain resource database; date, time, and user stamp on changes to resource database; ability for user to assign and edit keywords for resource search; multiple contacts per program entry allowed; activity prompts for action, referral, follow-up etc.; sophisticated reporting; ability to export resource and activity database's.

Synergy's flagship product, SAMS 3.0 (Senior Assistance Management System), automates and standardizes client management functions, making it possible for agencies to share data, generate reports and meet federal Administration on Aging requirements. OMNIA, Synergy's assessment and Outcome Measures system, offers an assessment tool that can respond to changing assessment requirements with single-point-of-entry for multiple agencies, provide sharable and re-usable assessment data, and produce meaningful outcome measures.

Beacon I&R System Requirements: Windows 95 or higher, 32MB RAM, Pentium I or higher, with 133MHz processor or higher.

Beacon I&R Cost: $2000 per site license, which includes up to 5 concurrent users and unlimited telephone technical support and updates for one year. Annual license and technical support renewal is $1,200 per site.

CIRAS 2000 CLIENT TRACKING SYSTEM –   ACIT, Inc.
P.O. Box 1015
Maywood, NJ 07607
(201) 587-9878
pbc@acitinc.com
www.acitinc.com

The CIRAS 2000 Client Tracking System is a database program designed to track calls to and referrals made by I&R programs. The software is designed so that field names and elements are changeable to meet the special needs of an organization. The tracking system provides the means to gather, retrieve, and analyze information.

CIRAS 2000 features: Developed to operate via the Internet; password protection and user security levels; time/event capturing and reporting on client information screen; caller information screen; reports include call summary report, number of client calls, average caller rent/income, and a call detail report; Microsoft NT; can be licensed to a file server on a network.

Cost: A multi-user license is priced according to the number of users, plus a base price. Includes a user manual and operations manual. Technical support runs $95 per hour.

CMS – JABR Software
     23995 Bat Cave Road, Suite 300
     San Antonio, Texas
     (210) 651-3155
     duko@jabr.com
     www.jabr.com

JABR Software describes themselves as a developer of client centric outcome measurement software. Their Client Management System (CMS) software is designed to collect and report information based on outcome planning and measurements at the client and agency level. Provided in this fashion, this information can be used by agencies and communities to more accurately identify issues.

CMS features: can work in an agency with one or multiple computers; user friendly and easy installation; multiple funder based standardized reports; ability to build custom reports; security features; customized individual assessment screens; demographic reporting section; crisis management section for logging calls and adding case notes.

A fully working demo of the CMS system can be downloaded form their Web site.

Contact JABR for information on system requirements and cost.

COMMUNITY LINK SOFTWARE – Human Services Technology
          988 Woodcock Road, Suite 101
          Orlando, FL 32803
          (888) 801-LINK
          www.humanservices.net
          mikeh@humanservices.net

Community Link Software was designed to automate the functions of community social services delivery. There are three components of the system:

- ✓ Community Resource Guide – Built as an I&R tool, this software allows organizations to build a directory of community resources and to publish that directory in print or electronically. Easy to use keyword searches allow for

access by novice users while detailed searches for more experienced users are also possible.   Supports Infoline Taxonomy or taxonomy of your choice.
- ✓ Client Management System – Automates the case management and record keeping process of the typical I&R or direct service agency. The system allows for intake, case notes, referral and service tracking, follow-up, scheduling and extensive, flexible reporting.
- ✓ ShareLink – This communication utility connects the organizations using the above applications through a centralized database, allowing for the sharing of client and resource information. Fully automates the record sharing process and includes confidentiality and security protocols

Community Link features: jobs database for clients; unlimited distribution of on-line viewing; print ready mailing labels; allows agencies to list qualifications, eligibility, fees, funding sources, directions, languages spoken, and other details; open database design; data conversion available from existing systems; data can be imported/exported in several formats.

A demonstration CD is available. Human Services Technologies offers training and support.

Systems requirements: 100 MHz Pentium Processor, 16 Mb RAM, 100 Mb Free Disk Space, Microsoft Windows 95, mouse and SVGA monitor.

Cost: The cost of the I&R component, Community Resources Guide, is $9,000 for unlimited licenses.   Because of the number of variables involved in pricing the Client Management System and ShareLink, contact Human Services Technology directly for more information.

COMMUNITY SERVICES LOCATOR – Gulf Coast Software
6685 Washington
Groves, TX 77619
(409) 963-3238
bojones@pernet.net
www.pernet.net/~bojones/locator.htm

Community Services Locator is a full featured software package designed for information and referral organizations. The current version, **Locator 2000,** features extensive client and contact data and promotes easy, quick referrals to appropriate agencies.

Locator 2000 features: client tracking includes 140 fields for client, significant other, and family members including 70 fields devoted to income and expense data; unlimited size notes area; 12 fields available for custom design; each client contact entered in a separate record which also displays client needs and referrals made; client contacts listed by date for easy reference; searches by AIRS/InfoLine Taxonomy, keywords, or by agency detail, all with geographical filtering.

System requirements: Windows 95, at a minimum, with 25 Mb hard drive space available. Minimum 16 Mb RAM required and 64 Mb recommended.

Cost: $600. This includes single user and network versions of Locator 2000, Quickfind (a services search-only program appropriate for unmanned locales and volunteer stations), the AIRS/InfoLine Taxonomy, and manuals. (Originally this product was priced at $3240 to assist with development, testing and support.) E-mail support is available at not cost. Interested I&Rs are invited to test the full working program at no charge.

CONNECT – Atlanta Regional Commission
       40 Courtland Street, NE
       Atlanta, Georgia 30303
       (404) 463-3220
       cschramm@atlantaregional.com

CONNECT is a database system designed specifically for the aging network.
 It uses a taxonomy based on the AIRS/Info Line Taxonomy of Human Services
that has been modified to reflect the needs of the aging network. CONNECT
uses Enhanced Services Program *(ESP)* software by CyberPATH Inc. and includes a
provider and service database as well as a client and caller database.

CONNECT features: an aging and long-term care taxonomy; centralized data collection and entry; data specific to service; import/export utility; detailed search and match capabilities; client and provider reports; and customization of screens.

The client/caller database documents demographic and needs information,
tracks service requests, facilitates matching of client requests to
appropriate provider, provides individual referral letters, tracks
referrals by client and provider, and tracks follow-up contacts. The
provider/service database organizes data by 45 major categories linked to
over 150 services.

Reports provided include summary listings, detailed client, provider and
service reports, referrals by provider and clients, and statistical
analysis.

Systems requirements: At a minimum, IBM compatible Pentium PC with 32 Mb
RAM (64 recommended) and 50 Mb hard disk space. MS Windows 95/98 or NT.

The new version of the software, *ESP 2* is scheduled for release in December 2000 and will upgrade ESP to Microsoft Access 2000, provide client/server (MS SQL Server 7.0) capability and additional design features.

Cost: One-time cost ranges from $1,800 to $2,500.

CUSTOMIZED I&R FOR THE 21ˢᵗ CENTURY –

Walter R. McDonald & Associates, Inc.
7311 Greenhaven Dr., Suite 273
Sacramento, CA 95831
Info@wrma.com
www.wrma.com

Walter R. McDonald & Associates, Inc. (WRMA), in cooperation with Info Line of Los Angeles, has developed automated I&R systems products which offer a number of useful features. WRMA has been developing I&R technology to support the I&R operations of Info Line since the early 1990s.

Features: advanced, versatile, and user friendly "point and click" environment; Web-enabled options for use with Internet Browsers; comprehensive registration of detailed service provider information; integration with the AIRS/Info Line Taxonomy of Human Services; on-line data collection, storage and retrieval of client demographic and service requirement information; recording of service requests; inquiry and identification of community resources to meet client service needs; reporting and service directory products.

WRMA I&R customizable products are directed to the medium through very large scale I&R agency, both private and government, for both Network and Web-Access.

Systems requirements: Customized I&R software operates best on Windows 95/98 NT and performs well with a solid Pentium hardware set of workstations (64 Mb RAM) and server (64 – 124 Mb RAM). Disk space is dependent on the size of the agency, but they report that 1 gb would serve a medium sized agency well.

At the time of this printing, the WRMA Web site reported that they were upgrading their products information and would have more details in the near future.

ECHO INTEGRATED SOFTWARE SUITE – Echo Management Group

1620 East Main Street
Center Conway, NH   03813
(800) 635-8209
sales@echoman.com
www.echoman.com

Echo was founded in 1980 to provide software for the behavioral health and human services world. Their products are designed to grow as your agency grows and can be adapted in-house to your methodology and requirements.

Echo's Integrated Software Suite, though not designed for I&R programs, offers the following:

- ✓ Clinician's Desktop: provides a flexible, electronic clinical record that includes electronic scheduling, treatment planning, assessments, client record information, progress notes and more
- ✓ Revenue Manager: accounts receivable and billing process
- ✓ Accounting for Windows: full accounting package designed for non-profit agencies
- ✓ By the Numbers: allows administrators to view productivity through any Echo application – including the performance of programs, clinicians or the entire agency.

Echo Integrated Software Suite Features: user-friendly; customizable; built in security; multiple platform support; single entry data system; integrated modules; productivity features etc.

System Requirements: Windows 95/98/NT

Cost: Pricing is dependent on the number of simultaneous users. Training and installation is included. Contact the Echo Group for detailed information.

<u>FIRST CALL DIRECTORY ON THE NET</u> – finaltouch.com
<div align="right">

4529 Ridgeview Drive
Eagan, MN 55123
(651) 454-2125
lebowitz@finaltouch.com
www.finaltouch.com
</div>

First Call Directory on the Net is a software product written entirely in Java and designed specifically to meet the needs of organizations with a large I&R user base. Data is duplicated on a series of centralized Internet-accessible computer servers running in parallel. The use of a "server farm" provides an extra degree of reliability for end users, who must be able to access data on a 24/7 basis.

The software client permits I&R specialists to create customized search preferences based on geographic criteria and categories provided by the AIRS taxonomy. It also provides a number of report printing options.

System requirements: The software will run on any modern Pentium class machine with at least 32 MB of memory. The software can be distributed to end users either on CD Disk, or preferably, via the Internet. A special new technique allows users with Web access to download the client software and automatically install it on their computers. A special mechanism is provided to ensure that users always have the latest version (the program checks for recent updates and automatically installs them at the beginning of each work session).

Cost: Contact finaltouch.com for more information.

FSMIS – Family Service Management Information Systems, Inc.
906 Lantern Tree Lane
Wellington, Fl 33414
(561) 798-4657
fsmistoo@aol.com
www.fsmis.com

FSMIS includes three software systems: Client Tracking System; Contribution and Pledge System; and Information and Referral.

Information and Referral (I&R) features: tracks callers as well as individuals called about; maintains an on-line directory of all service providers; provides a service taxonomy or allows the user to use their own; provides on-line referrals with automatic letters to both the caller and the provider; alerts staff to crisis and repeat callers; supports a follow-up list for specified callers; prints a comprehensive service provider directory in notebook or rolodex format; tracks the amount of time spent on each call by each provider; collects demographic data; transfers cases to Client Tracking System waiting list.

Client Tracking System features: collects comprehensive data about clients, programs, workers, and the services offered by host agency; generates over 100 reports including demographic reports; schedules workers, clients, meeting rooms, and equipment; maintains a client waiting list; keeps disaster plans for vulnerable clients; generates client invoices using sliding scale fees; tracks payments and prints receipts; is a complete accounts receivable system. They now also offer FAST-2000, a Windows version of their DOS client tracking system featuring many improvements to the system.

Contribution and Pledge System features: tracks all gifts and pledges; calculates net cost of purchased goods or events, prints a receipt and meets IRS standards; writes thank you letters, pledge invoices; collects and analyzes information about donors; tracks volunteer time.

Features of all three packages: menu driven and user friendly; each agency defines it's own programs and services; can be customized for each purchaser; purchase includes agency-wide license and free telephone and modem support for six months.

Systems requirements: written in Dbase for DOS; runs in Windows 3.2 or higher.

Cost: Contact Family Service Management Information Systems directly for information on pricing.

HELPWORKS – *Peter Martin Associates*

2650 W. Montrose, Suite 150
Chicago, IL 60618
(773) 478-2400
sales@petermartin.com
www.petermartin.com

HelpWorks is an I&R as well as an eligibility screening software program that can assist in determining which benefits and services individuals may be qualified to receive. A caller is taken through a brief defined interview process that results in identifying services for which the applicant qualifies. The interviewer can then send an e-mail to notify the service provider of the referral.

HelpWorks features: focuses on accurate screening and assessment; open architecture allows easy modification of eligibility rules; integrated reporting tools and charts; ability to create custom reports.

HelpWorks is available in a variety of packages. The HelpWorks product line supports mobile and Web based screening as well as traditional desk top tools. The HelpWorks Standard Edition is the entry level product optimized for a single user or a group setting of up to 15 simultaneous users and is ideal for a lap top. The HelpWorks Enterprise Edition is a client server version for larger agencies and has the ability to handle hundreds of simultaneous users. The HelpWorks Web Edition allows client access to information and resources as well as eligibility screening.

Systems requirements: Minimum requirements are Windows 3.1, 95, or NT, 486-66 or Pentium Processor, 24 Mb RAM, 40 Mb available hard disk space.

Cost: Contact Peter Martin Associates for more information.

I & R HELPLINE – ADS

1421 N. New Jersey
Indianapolis, IN 46202
(317) 637-0110
sales@ads-inc.com
www.ads-inc.com

I & R Helpline was developed by ADS to assist information and assistance providers in storing and retrieving information on resources by multiple categories and in tracking referrals.

I & R Helpline features: Fully network compliant; unlimited number of resources stored with contact information, fees, areas served and up to 12 lines of notes; automatically prints a directory of resources with table of contents; resources linked to unlimited categories; search by category or resource name; referral history by resource, source of

inquiry, and type of referral; can be customized; Internet publishing module turns database into a series of uploaded Web pages; printed output includes resource mailing labels.

System requirements: Single user needs a Pentium computer with 16 Mb RAM and WINDOWS 95, 98 or NT. Multiple users need NT server.   DOS and Windows versions are available.

Cost: $995 for a single user copy and $1500 for the Network version. Both include one year of support.

INDEX
I&R Systems – New England Index
Eunice Kennedy Shriver Center
200 Trapelo Road
Waltham, MA 02154
(781)642-0246
ne-index.shriver.org
Rbass@Shriver.Org

INDEX provides technical assistance to agencies interested in developing information and referral systems. With their expertise in relational database and groupware technologies, they can assist in the design of an application and the development of software. They can also assist in establishing protocols for data collection and for updating files.

INDEX also has extensive experience in the development of state-wide information systems. They are available to individual agencies or state-wide coalitions for the analysis of information needs and to facilitate coalition building. For an example of a state-wide system, see the page for the Mass Network of Information Providers (MNIP) on their Web site.

Cost varies depending upon the services requested.

IN FOCUS MULTI-AGENCY CLIENT TRACKING – In Focus
3313 Gillham Rd.
Kansas City, MO 64109
(816) 756-0070
infocus@swbell.net

In Focus develops customized and easy-to-use Internet applications that allow multiple agencies to maintain a common client database. Programs can be configured to hide or share specific client information across agencies. All utilize a client/server architecture that has speed and security advantages over Web browser based applications in viewing and editing data. To protect confidential client data, both the database and client-to-server

communications are encrypted. Three levels of password authorization are available that govern user access to program features.

An off-the-shelf program is available for multi-site social service agencies. Other applications can be developed and customized to meet any data tracking needs.

In Focus features: complete tracking of intakes, activities, outcomes, case notes, hotline calls, and case management goals; a full range of built-in reports including user-customizable queries; unlimited capability for users to add new intake fields, program names, staff names, and outcomes; "community" functions such as an announcement service, events calendar, file library, and client referral directory; the ability to create client records off-line and later upload them to the common database; a built-in start-up guide, "tip of the day" function, and complete user help menu.

System requirements: Programs run under any version of Windows from Windows 95 on. Each user installs a single file on their computer that occupies under 1 MB of disk space. Performance is brisk on dial-up phone lines and very fast with broadband connections.

Cost: Contact In Focus for information.

INFORM ONLINE – Abaris Technologies
6215 Ferris Square, Ste 120
San Diego, CA 92121
(858) 550-0567
patrick.moorhead@abaristech.com
www.abaristech.com

Inform OnLine is a Web application designed to create a local Web community for your organization.   Inform Online not only gives you a searchable database, but also creates a place where service providers meet to exchange ideas and gather needed information.

Inform OnLine features: resource database allows users to search by name, keyword, Taxonomy, geography and language using SQL Server database technology; ability for agencies to update infomraion online; user defined topic discussion areas; event calendar by day or week; daily message on the home page; quick reference rolodex for frequently used agency info; comprehensive user security allows designated access to areas of the Website; administration tools allow management of the site behind the scenes; local area customization; data migration from any I&R database; add-on modules.

Homeless services and domestic violence service modules are available separately. Each of these modules creates a protected communications center designed to allow professionals to exchange ideas and find resources. Features include a bed availability matrix allowing shelters to post current bed openings, protected topic discussion areas and a protected news of the day bulletin board.

Systems requirements: Does not require you to buy hardware, software or Internet connection. Inform Online is offered as a "hosted application" by subscription. All technical requirements are provided.

Cost: Contact Abaris Technologies for information.

INNCASE – Innovation Two
          1565 Hollywell Ave
          Mississauga, Ontario
          Canada   L5N 4P6
          888-INN-WARE
          bob@innovationtwo.com
          www.innovationtwo.com

InnCase is a full featured case management and referral package that has been in use, and evolving since 1991.

InnCase features: InnCase is a full-featured case management tool that allows for detailed tracking of all client services delivered. InnCase is intended to fully replace paper-based recording, so when a client is seen, the observation or case notes are entered in the computer. InnCase automatically records related program codes, type of service, staff ID and times, adding only about 2.5 seconds to the time it takes to do the case note. This data can be used to analyze all aspects of client service, and measure outcomes against service delivery components. A variety of reports and outputs provide statistical as well as client summary information. Training for InnCase is delivered as fully automated, computer based multi-media material.

InnCase can be used as a stand-alone product, or groups of agencies or multiple sites can work together. InnCase can be set up to selectively share certain categories of information across the whole group. This sharing uses proprietary communications facilities which are completely safe from any outside parties, and protect client confidentiality outside the user agencies.

A taxonomy based Information and Referral product is fully integrated with InnCase. This tool was previously released by Innovation Two as a stand-alone product, and has been in use since the mid 1980's.

System requirements: It is available for use with Windows 95/98/2000 and NT, but since all versions of InnCase are data compatible, Innovation Two still supports DOS. All versions can be run in any combination on the same network.

Cost: The principal site license is $4000. Additional sites are $500 each. An additional "per user" license fee ranges from $150 to $250 and is based on simultaneous use, rather than number of staff. The license fee includes enough support to get the program up and going and after that, support is $95 per hour.

IRis – Benchmark Enterprises
      4633 10th Ave. North
      Lake Worth, FL 33463
      (800) 458-7327
      iris@irissoft.com
      www.irissoft.com
      www.irissoft.net – IRis for the Web

IRis Information and Referral Software has been around since 1993. The current software is Version 2.0 and can be used by a single I&R, multiple agencies or a state-wide system.   IRis claims almost 800 users with a national association of users and a quarterly newsletter. A demonstration package is available upon request.

System features: Allows for searches using keywords, taxonomy, agency or program names; user defined combination searches (i.e. programs for disabled that accept Medicaid); supports AIRS /Info Line Taxonomy of Human Services; security features limit access to case files; full case management module available; multi-user version has no limit on concurrent users; volunteer opportunity tracking/matching module; built in IRis Connect communications software allows file transfers between sites; single user, multi-user, and multi-site licensing available; assistance with data conversion to IRis available; Directory on Disk Generator program also available; IRis for the Web version now available.

Systems requirements: 486Dx266PC with 16 meg RAM minimum; Pentium processor and 32 meg RAM recommended; 45 Mb free disk space required for installation, but more space will be needed as contact records and agency information is added; Microsoft Windows 95/98; will run on most local networks including Lantastic, Windows 95, Novel, and Windows NT.

Cost: $1500 for a single user license for one computer including 2 hours technical support; $4,000 for a multi user license for installation on a single file server with unlimited attached users including 3 hours free technical support; additional technical support is $295 for 3 hour blocks on 800 number; IRis for the Web is $3500 for first year hosting data on their server. Contact IRis for more detail and discounts.

N-PAIS™ – Southlands Information Systems Ltd.
      #920-1040 West Georgia Street,
      Vancouver, B.C.   Canada   V6E 4H1
      1-888-606-7247
      sales@southinfosys.com
       www.southinfosys.com

The Non-Profit Activity Information System, N-PAIS™, is relational database software developed to offer all types and sizes of non-profit organisations a comprehensive information system in an easily customised package. N-PAIS allows you to customise

data collection so that system requirements can evolve as needed, without further software expenditures.

N-PAIS features: combines user-friendly screens, structured data relationships and functional layouts into a Contact Manager that details service delivery, staff resource utilisation, external supplier relations and donor management; tracks the who, what, when, where and how involved in a non-profit operation; multiple security features; empowers authorised users to add fields, look up values, change terminology, etc.; tracks activities for multiple entities (departments, programs, branches); allows the strength of 3rd party reporting software to supplement its own internal reports; allows data to be quantified for analysis that provides easier marketing and accountability reporting.

Cost: Stand alone installation is $550. Networks with either a dedicated server or a workstation doubling as the database server is $1,300 with each N-PAIS workstation 'seat' installation at $450. Pricing includes a CD-ROM with the N-PAIS software product, on-line system "Help" files and initial one-day system registration/activation and related support via internet or telephone.

Supplementary Support Services include:
- initial 30-day period phone/modem/internet support @ $175; or
- initial 60-day period phone/modem/internet support @ $300
- 6 months or 5 hours, whichever comes first, phone/modem/internet support @ U$275

North Dakota I&A Database - Sandy Eckenrode
        North Dakota Aging Services Division
        Information Technology Department
        (701) 328-2452
        seckenro@state.nd.us

The North Dakota Department of Human Services Aging Services Division has developed their own aging Information and Assistance database system. It is a Lotus Notes application database designed to track information for the Aging Services Division. As an on-line system, they have future plans for the provider segment to be Web enabled.

Features: The system actually consists of two databases, one on providers and one on callers. The provider database includes name and contact information as well as a description and summary of services including office hours, eligibility requirements and fees if applicable. The caller database tracks an individual calling and the client if different, age, ethnicity, type of information requested as well as response/referrals made and who referred them. A number of different views or lists of providers and callers allow those with access to view the information in many sequences. Callers can be sorted by alpha, last update or follow-up dates. Providers can be sorted by alpha, service, region, state, program and last update. Reports can be generated.

Cost: **This product is not being marketed.** Those interested in developing their own software may contact Sandy Eckenrode for information.

OCTOPI – Community Networks Corporation
          210 Park Avenue
          Worcester, MA 01609
          (508) 735-9051
          generalinfo@cnetworks.com
          www.cnetworks.com

Octopi Client Management Software is designed for multi-service organizations needing to manage several programs and multiple databases. It is open and configurable for each department in an organization and provides outcome based client tracking on a service by service basis for multiple funding sources and fiscal years.

Octopi features: easy-to-use and adapts to changing agency needs; agency staff can add new programs as needed; an "open import" feature allows agency to continue using existing software; standard and custom reporting capabilities; security features to limit access to files; stores each program's data in a separate database as well as central database; Octopi manages data across multiple sites and agencies securely; easy to use client intake screens;

Contact Community Networks Corporation for information on cost and system requirements.

"Q" – Charles H. Mack and Associates
          10101 Alliance Road, Suite 10
          Cincinnati, OH 45242-4715
          (513) 936-6000
          qinfo@chmack.com
          www.chmack.com/q

Q Continuum Management System is a comprehensive case management information system which allows networked providers to log, access, edit, save, and historically reference client, service, and provider data. Q allows users to share information in real time via either a direct or Internet connection.   It replaces CH Mack's Senior Information and Services (SIS) software.

Q features: multi-dimensional security profiles; tracks client care and delivery of services; electronic on-line referrals; service unit tracking; billing and accounting including client co-pays; integrating e-mail and messaging; allows users to import/export data; NAPIS data tracking and reporting; eligibility matrix and waiting list management; case management notifications; multiple care plan development and management functions; budget tracking; and auto-generated letters via third-party word processors; Web links.

System requirements: minimum requirements include Pentium 200; 32 Mb RAM; 10 Mb hard disk space; SVGA monitor; 32 bit MS Windows 95/98/NT4.x environment.

Cost: CHMA licenses its software by user.   Pricing is on a per license basis.

<u>REFER 2000</u> – RTM Designs
2222 Francisco Dr.
Bldg. 510 Suite 103
El Dorado Hills, CA 95762
(916) 933-7367
rtm_designs@msn.com
www.refersoftware.com

Refer2000 is the latest version of the Refer modular I&R software system package.

System features: Category Search System for easy search and referrals; taxonomy, agency, site and program searches; multiple simultaneous service searches; supports AIRS/Info Line Taxonomy; client and call tracking; user defined call/client outlines for specific programs or data collection; unmet need and follow-up action; statistical reports; developed with Microsoft Visual Basic 6.0 and Access 2000; data is open to third party tools such as statistics packages and report writers; automatic directory production.

RTM Designs offers on site training for Refer2000. Training sessions are typically 3 days, covering all aspects of the program.

System requirements: Minimum requirements for single user are Pentium 200 MHz PC, 32 Mb RAM (or more), 150 Mb free disk space, SVGA Monitor, and Windows 95/98/2000. Recommended requirements for multi-user LAN are Pentium 200 MHz (or greater), 96 meg RAM (or more), 300 Mb free disk space and Windows NT or Novell.

Cost: Pricing for full system ranges between $3,000 and $5,000 depending on size and number of users.

RTM Designs has recently introduced ReferWeb, a comprehensive internet software package designed to read an I&R resource database and present the data in a logical and easy to use Web front end. ReferWeb uses the same search technology as Refer2000 and is currently available for both Refer2000 and IRis systems. The annual service fee starts at $3,000 and is based on the number of service sites and optional features.

THE RESOURCE HOUSE – North Light
431 Brown St.
Iowa City, Iowa 52245
(319) 621-1013
wendy@northlightsoft.com
www.northlightsoft.com

The Resource House is a public access information, referral and enrollment system that allows individuals, including those with little or no computer experience, to find information and sign up community resources online. Resource House can be accessed from home or public access stations in libraries, schools or other community based organizations. Within Resource House, the Provider Annex allows community agencies and educational institutions to update information about their programs stored in the Resource House library, with quality control managed by the I&R agency. The Provider Annex also allows participating agencies to access public inquiries, download intake information and generate anonymous reports about usage and users.

Resource House features: inexperienced computer users can operate; web-based interface employs 8 multicultural guides; program information can be viewed in as many languages as required (currently available in English and Spanish); information is provided at the 5th grade reading level; users can e-mail providers; electronic enrollment; optional sounds and touch-screen capability for public-access computers.

North Light has also developed a number of Link Wizards, such as IRis Link Wizard, to give I&Rs the ability to import their current data into the Resource House database.

Cost: The Resource House Package includes database maintenance and referral software ($3600) and Resource House on-the-Web ($4500 annual license plus $200/month hosting), which covers up to 1 gigabyte of database storage (approximately 20,000 programs plus 20,000 client records) on the Web server. Additional storage costs $100 per month per gigabyte.

SERVICEPOINT – Bowman Internet Systems
400 Travis Street, Suite 1900
Shreveport, LA 71101
(888) 580-3831 ext. 3196
info@bowmansystems.com
www.servicept.com

ServicePoint is a web-based information management system for social service agencies, coalitions, I&Rs, and communities. It provides client tracking, case management, agency and program indexing, and reporting in a real-time environment over the Web.

ServicePoint Features: The client intake module captures detailed information such as demographic, medical, residential, employment, skills, expenses, legal, military, case

notes, and more. The service module tracks each service, need, or referral you make for a client. ServicePoint uses a centralized database and allows each agency to have complete control over how their information is shared. ServicePoint allows you to notify an agency of a referral via e-mail. ServicePoint's security options protect client confidentiality. A program database allows agencies to update their program information. Agencies are indexed using the AIRS/INFOLINE taxonomy. The system generates common reports such as unmet needs, aggregate statistical reports, and the HUD APR report. A custom report writer can be used to build your own reports. Additionally, a shelter module is available to track shelter bed availability. An add-on product is available to publish your I&R database to the Web. It also allows each agency to post volunteer needs, a wishlist, and a calendar of events.

System requirements: 486 or higher (ideally Pentium 200+); 28.8 or higher modem (ideally 56.6 or ISDN connection); Internet connection.

Cost: Single agency systems begin at $3,295. Pricing for multi-agent systems varies depending on number of users.

SOPHIA – Caracole, Inc.
                 1821 Summit Road, Suite 001
                 Cincinnati, OH 45237
                 (513) 761-1480
                 www.sophiatech.org
                 www.caracole.org

SOPHIA states that their primary goal is to build the capacity of the not-for-profit community through technology. SOPHIA programs help multiple human service agencies to work together and share information.   The program started in Cincinnati, Ohio serving agencies that provide housing, but soon grew to encompass the entire human services network there. The Cincinnati SOPHIA Information and Referral database is currently used by 65 agencies with nearly 1400 agencies listed, 2000 affordable housing units, a shared calendar and electronic library. SOPHIA has two companion programs, HOMER and VESTA, which serve to integrate basic client tracking with referrals.

SOPHIA features: allows users to search the database using keywords, telephone book type listings, service categories/topics, and by client demographic profiles; detailed information, reports and street maps are included; housing database can be searched by price, neighborhood or other options, and includes detailed information for clients with disabilities; home ownership module is included; cooperative maintenance allows all users to update and add information; interface was designed by a team of social service professionals; data export to kiosks or the Web is currently under construction.

System requirements: Each SOPHIA user needs Windows 95/98/2000; 486 or higher processor (Pentium recommended); 16 Mb RAM (32 recommended); 30 Mb hard disk space, additional 80 Mb hard disk or server space for mapping information; modem or

other Internet connectivity. Multiple site networks will also require a server, modems and the SOPHIA consolidator, a server component that aggregates data from remote sites.

Cost: Licensing outside Cincinnati Ohio. SOPHIA 2.5: Workstation version, freestanding or LAN: $5,000. SOPHIA Consolidator $2000. HOMER 2.0 $3000; HOMER consolidator $2000. Contact SOPHIA to discuss the best mix of these components for your city or agency.

STAR – Cuadra Associates, Inc.
       11835 West Olympic Boulevard, Suite 855
       Los Angeles, CA 90064
       (310) 478-0066
       Salessupport@cuadra.com
       www.cuadra.com

STAR is a multi-user, multi-purpose software package which is able to manage information collections of all types through standalone, networked, Internet and Intranet use. Though not developed specifically for use by I&R providers, it has been used for such applications. In addition to the core program, there are a number of optional application packages which users can implement. These applications can be modified at any time without the need for programming. STAR can handle a client call from intake, through assessment and referral, to establishing an appropriate follow-up mechanism.

STAR includes four interfaces: STAR Client allows users to tailor all screens – and the search, input, and other operations behind them – to meet their unique needs; STAR Web is a World Wide Web browser-based user interface which provides interactive information retrieval on an intranet or the Internet; STAR Z39.50 allows STAR to work as a Z30.50 compliant server on an intranet or the Internet; and Classic STAR is for use on ASCII terminals or terminal emulators on PCs, Macintoshes, or UNIX workstations.

System requirements: STAR runs under Microsoft NT and Windows 2000 operating systems as well as under a number of UNIX systems including AIX, Digital UNIX, HP-UX, SCO, Solaris, and SunOS.

Cost: STAR software is sold on the basis of a perpetual license, for a specified number of simultaneous users. The basic STAR package starts at $3,330 for one simultaneous user and runs $20,965 for 10 simultaneous users.   Prices go up to 200 simultaneous users. There are several add-on software packages.

TAPESTRY – VisionLink Inc.
11 Bridlegate, Suite 100
Littleton, CO 80127
(877) VSN-LINK
change@visionlink.org
www.visionlink.org

Tapestry is a data management system that unites agencies, clients, volunteers and donors within a community. Tapestry provides descriptive information profiles on agencies and services that allow staff and clients to explore, search and respond. Using the Internet, Tapestry allows agencies and organizations to more easily communicate and coordinate.

Tapestry features: directory of services using a default taxonomy or user's choice; searches conducted several ways; multilingual; case management modules can be shared by all agencies or a limited number; integrated I&R tools; volunteer registry and coordination function; donor outreach function; community wide calendar and communication system including interactive message forums; referral management system;150 custom fields for pre-built customization; ongoing ability to re-design your Tapestry system; multiple security levels; on-line assistance; integrated E-mail and Web links.

System Requirements: Access to Tapestry is through the World Wide Web using a standard Web browser. Tapestry is built on a cross-platform environment, allowing application development and deployment on Windows 98/NT or Macintosh, and deployment additionally on Sun Solaris, AIX, and SGI IRIX. Visionlink maintains the servers, backup systems, upgrade and monitoring equipment.

Cost: Tapestry is purchased through a one-time license fee based on either the population of the area or the number of agencies using the system. It can also be licensed on an annual basis per agency. A low monthly fee for the entire system provides technical support, upgrades and other benefits.

SOFTWARE <u>NOT INCLUDED</u> IN THE
BIBLIOGRAPHY OF SOFTWARE FOR INFORMATION
AND REFERRAL PROGRAMS

If you are aware of software not included in the bibliography, please respond to as many of the following questions as possible:

Name of Product: _____

Name of Company Distributing Product:_____

Address:_____

Phone:_____ Contact Name: _____

Web site:_____ E-mail:_____

Have you used this software?   If so, please answer the following questions:

   1. How long have you used the software?

   2. In general, has the software met your expectations? Please explain.

   3. Are you pleased with the support and technical assistance you've received?

   4. If you had the opportunity to recommend changes to the software's capabilities, what might you recommend?

Please provide us with the following information so that we may contact you with any questions:

   Agency:
   Contact Person:
   Phone: E-mail:

Please fax the completed form to Greg Case, National Aging I&R Support Center, at 202-898-2583

SOFTWARE LISTED IN THE
BIBLIOGRAPHY OF SOFTWARE FOR INFORMATION AND
REFERRAL PROGRAMS

If you have used one of the software products listed in the bibliography, please provide us with the following information:

Name of Product: _____

     1. How long have you used the software?

     2. In general, has the software met your expectations? Please explain.

     3. Are you pleased with the support and technical assistance you've received?

     4. If you had the opportunity to recommend changes to the software's capabilities, what might you recommend?

     Additional Comments:

Please provide us with the following information so that we may contact you with any questions:

     Agency:
     Contact Person:
     Phone: E-mail:

Please fax the completed form to Greg Case, National Aging I&R Support Center at 202-898-2583

CUSTOMIZED I&R SOFTWARE

If your agency has developed it's own software for use with I&R programming please assist us with as much of the following information as possible:

1. Did you develop the software internally or use a consultant?

2. If you used a consultant, who did you use?
   Name:_____

   Contact Information: _____

   _____

   _____

3. Briefly describe the specific features of your software product. What does it do?

4. Is the product being marketed? If so, who should we contact for more information?

5. If it is not on the market, would you be willing to speak to other providers about your experiences in developing your own software?

Please provide us with the following information so that we may contact you with any questions:

Agency:
Contact Person:
Phone: E-mail:

Please fax the completed form to Greg Case, National Aging I&R Support Center, at 202-898-2583