



Sohema Dynamics 365 Architecture and Functional Breakdown

Sohema ???



Agenda

- Sohema Overview
- Sohema Evolution
- Sohema 365 Objectives
- Sohema 365 Overview
- Architecture
- Functional Decomposition



Sohema Overview

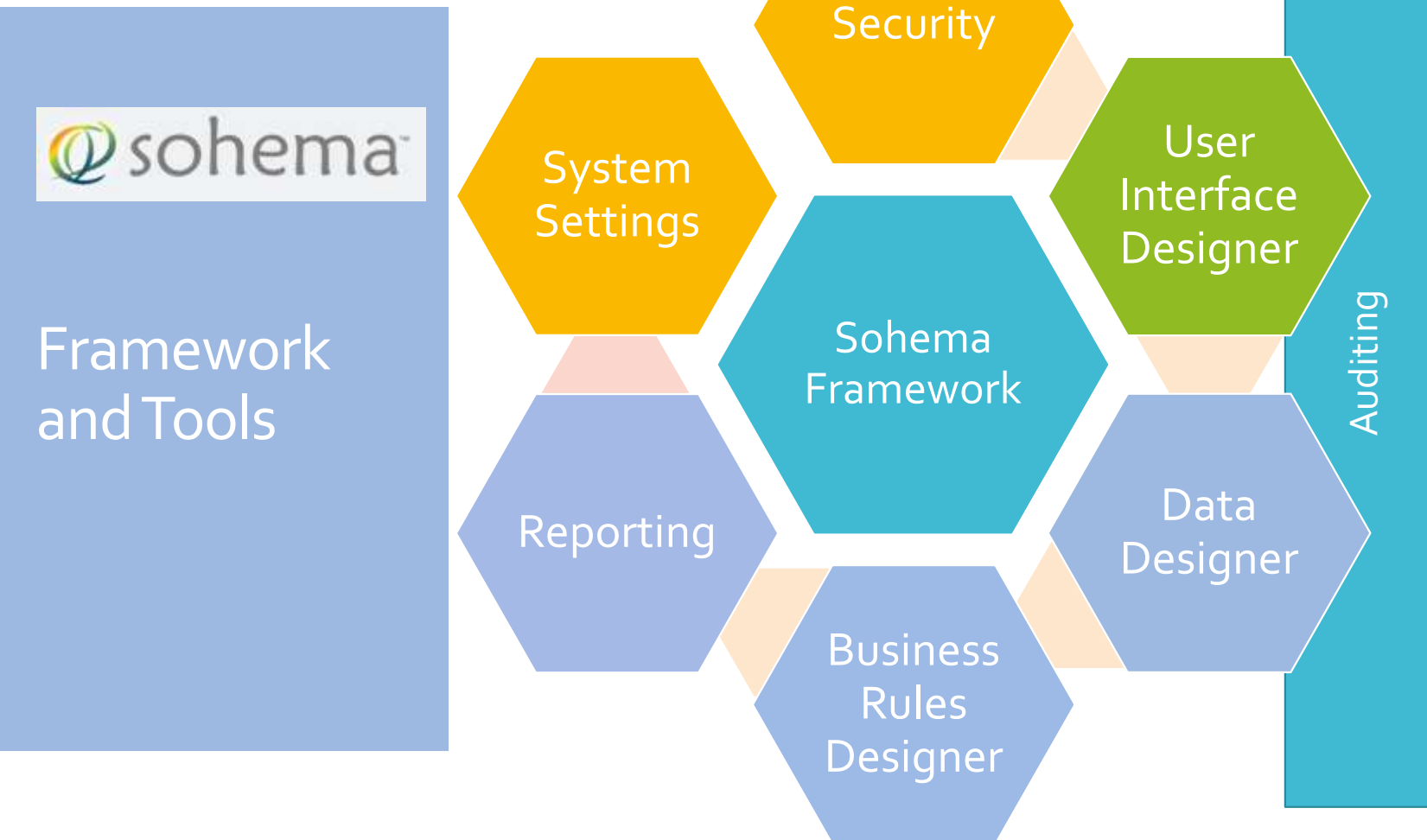
The following provides the context for Sohema from the current implementation. This forms the initiation of the context for the next generation of Sohema in Dynamics 365.



Sohema Overview

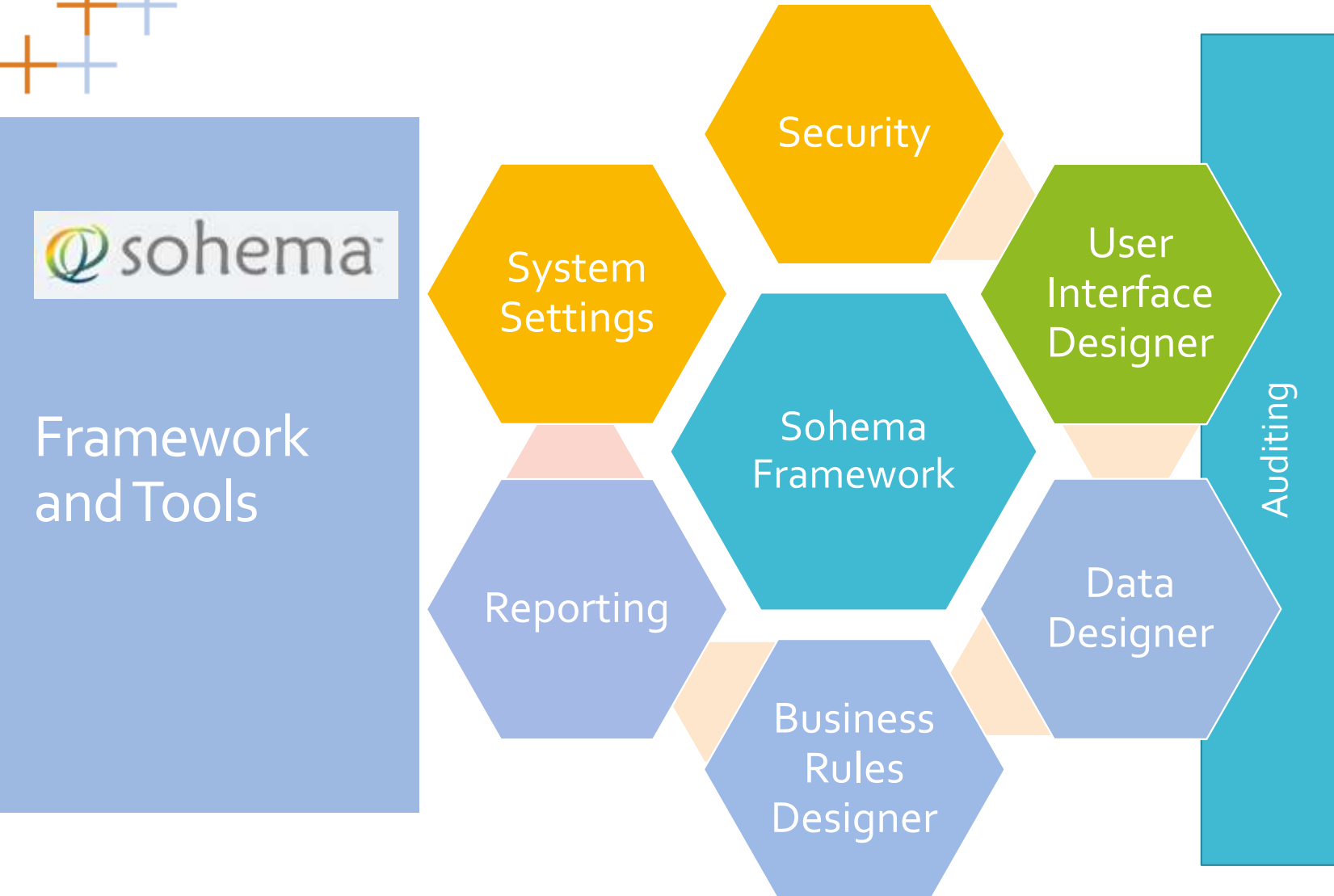
- Browser-based access
 - Cross-browser compatibility
- Flexible and configurable security access
 - Role based access and privileges
- Every action of users can be audited
 - Reads/views
 - Adds, updates, deletes, inserts
 - Delete actions are generally virtual only – historical record is preserved in the database
- Very consistent end-user experience

Sohema (Social & Health Management Software)



- Flexibility through tools
- Purpose built for Case Management
- Includes a framework that enables:
 - Easy and flexible configuration
 - Lower cost of delivery and ongoing support
 - A rich, consistent End-User experience
 - Flexibility for a broad set of business needs

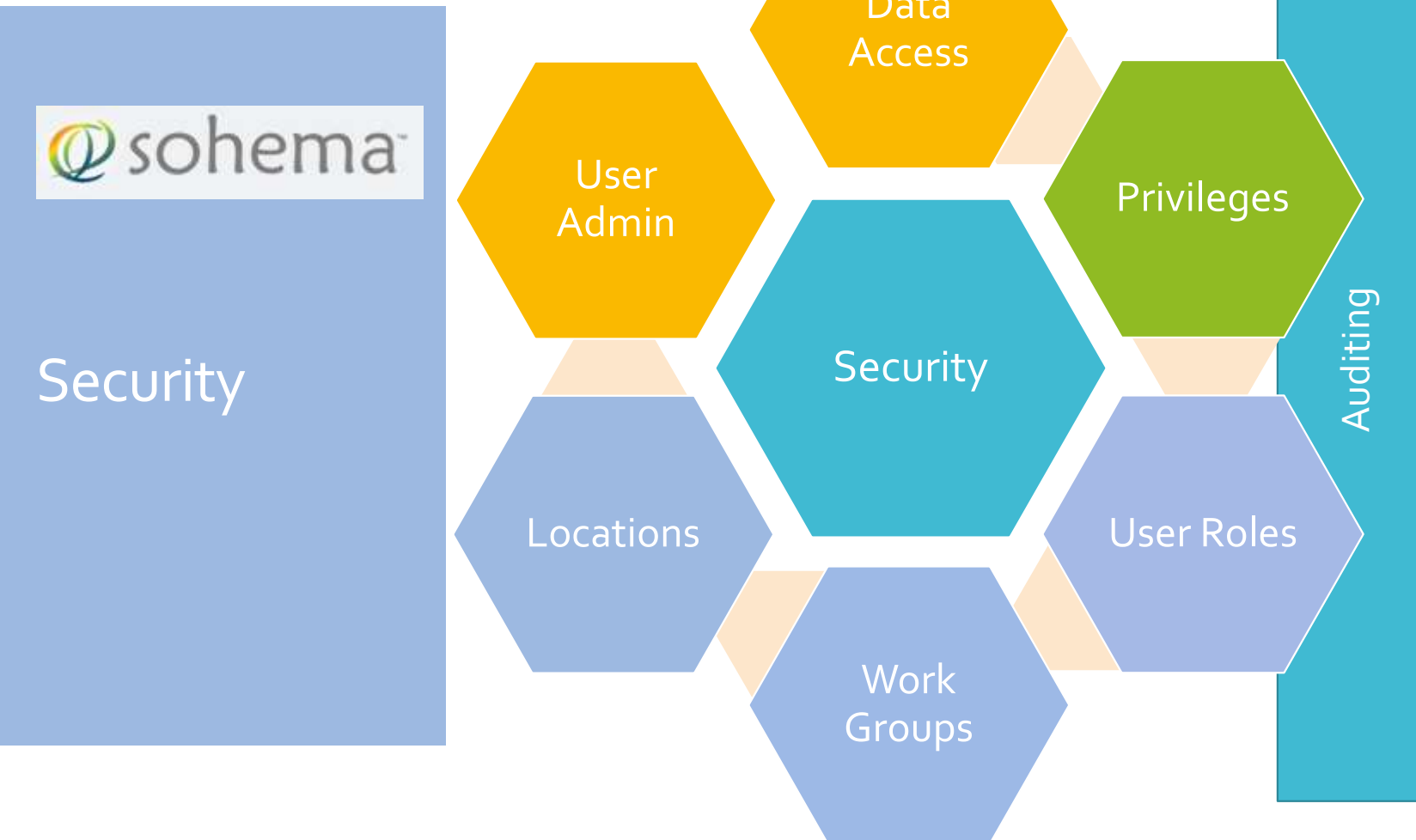
Sohema (Social & Health Management Software)



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Secure



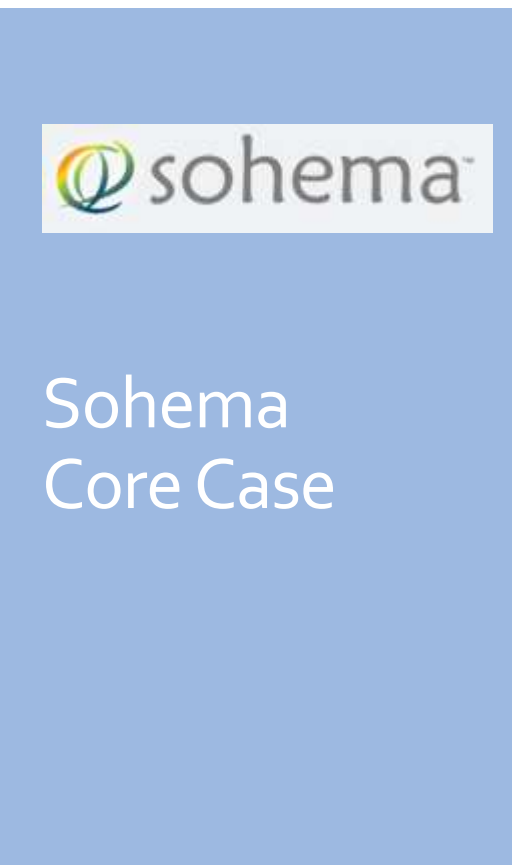
- Core Security:
 - Manage users, locations and workgroups
 - Manage access to cases through security
- Built in Audit
 - All actions audited

Person Centric



- Core building blocks provide:
 - Person at the center
 - Fundamental Person and Organization needs “out of the box”
 - A single, consistent view of clients in the organization

Core Case



- Core Case building blocks provide:
 - Fundamental case management needs “out of the box”
 - Specific, HHS program functionality
 - A single, consistent view of clients in the organization
 - Adaptability across business areas
 - An integrated solution across business areas



Flexibility of
Sohema to meet
Case
Management
Needs

- University of Massachusetts Center for Health Care Financing (since 2008)
 - Casualty Recovery
 - Estate Recovery, Liens, Special Needs Trusts, Annuities
 - Enhanced Coordination of Benefits, Premium Assistance
 - Asset Verification
 - Retroactive Medicaid Recovery (implementation pending)
- University of Massachusetts Disability Evaluation Services – MA, NH, OH
- Family Services of Greater Vancouver - PTM, Family Reunification
- West Coast Family Centres - Family Reunification
- Vancouver Aboriginal Child and Family Services Society
 - Family Reunification
- Onion Lake Health and Wellness – Community Health, Counselling
- BC First Nations Health Authority – Counselling, Dental Services
- Child Protection and Family Services Agency of Jamaica
 - Investigation, child protection, foster care, counselling, adoptions



Sohema Evolution

The evolution to Sohema 365 involves transitioning from the current Sohema platform to the newer technologies. This transition will focus on transitioning the base product to the new platforms and leverage the capabilities of the newer technologies to expand on the capabilities of Sohema's case management for Human Services.

The previous slide shows the current customer base and different Human Service domains. The new version of Sohema will need to allow for meeting the requirements of those domains within the Human Services marketplace and to extend the capabilities to allow for Avoette to pursue broader markets within the case management verticals and horizontal markets.

Sohema will leverage the power of the Dynamics platform and capabilities, but implement and extend the case management from Dynamics to fit the Human Services model. We will implement the Sohema flavour to the new Sohema 365 product within Dynamics 365.



Sohema Dynamics 365 Objectives

Product Vision:

Sohema Dynamics 365 provides a unique case management product that delivers key OOB Human Services case management solutions based on Microsoft's Dynamics 365 Customer Service module.



Objectives

- Utilize an industry leading set of tools and framework to deliver case management
 - And enable the use of core productivity tools like email, appointments etc “out of the box”
- Develop domain specific IP that will be identifiable as an Avocette asset
- Provides recognizable benefits to customers
- Extensible to any case management domain
- Delivers core Human Services case management functionality
 - Based on Sohema core case management
 - Extended by the capabilities of Dynamics 365
- Tools to configure the core case management
 - Higher level tools for non-technical users
- Tools to configure and manage extending for client specific needs
 - Higher level tools for non-technical users
 - User configurable fields and forms
- A true product
 - Managed product components
 - Extensible client configurable components
 - Forward compatibility



Sohema Dynamics 365 Market

Market: Sohema Dynamics 365 will focus on the following market segments:

- Human services
 - Community agencies
 - Social sector agencies, child and family services,
 - State/provincial/local/county government
 - Medicaid recovery, fraud waste and abuse (FWA), services management
- Datawalk integration and case management (FWA and more)
- Further definitions of specific verticals and horizontal markets will be further defined as the product roadmap develops



Sohema 365 Overview





Sohema 365 Overview

- Portals
 - Base customer portals
- Persons/contacts
 - Core Sohema plus more
- Organizations/Providers
 - Core Sohema plus more
- Cases
 - Ability to configure 1 or more case types for clients
 - Persons or organizations as client
 - Core Sohema case plus more
- Administration tools
 - Configuration of core case management
 - Service management



Sohema 365 Functional Decomposition





Sohema
Summary
Decomposition

Referrals

Persons/Contacts

Organizations

Services

Assessments/Surveys

Cases

Tools and Administration



Referrals Portal

- Main Page
- Referrals
- TBD - more

Sohema Referrals Lists and Views

- New Referrals
- Open Referrals
- My Referrals
- All Referrals
- Closed Referrals

Referral Workflow Process

Sohema Referrals

- Portal Referral Details
- Referral Details
- Screening/Decision
- Notes
- Documents
- Timeline/Activities
- Sohema Case Creation

Sohema
Referrals
Decomposition



Sohema Person Decomposition

Sohema Context Add-in

Sohema Person Details

- Details
- Identifiers
- Timeline
- Related
 - Cases
 - Appointments
 - Tasks

Cases

- Client Cases
- Affiliated Cases
- Relationship Cases

Relationships

- Relationships
- Households Lists
- Relationships Link Diagram

Contact Information

- Addresses
- Emails
- Phone Numbers

Connections

Sohema Case Decomposition

Sohema Context Add-in

Case Workflow Process

Sohema Case Details

- Person Details
- Case Details
- Intake/Referral Summary
- Timeline
- Related
 - Appointments
 - Tasks

Participants (Connections)

- Persons
- Organizations
- Users

Appointments/Notes/Documents

- Appointments
- Notes
 - Contact notes
 - Collateral notes
 - Admin notes
- Documents

Assessments (Surveys)

- Lists
- Details and Responses
- Dashboards

Case Plans

- List
- Goals
- Activities
- Notes

Case Service Referrals

- Internal Services
- External Services



Sohema Context Add-in

Sohema Organization Details

- Details
- Timeline
- Related
 - Cases
 - Appointments
 - Tasks

Cases

- Client Cases
- Affiliated Cases
- Relationship Cases

Relationships

- Contacts/Connections

Contact Information

- Addresses/locations
- Emails
- Phone Numbers

Services

- TBD

Sohema Organization Decomposition

Sohema Context Add-in

Sohema Services

- TBD

Sohema Services
Decomposition

Sohema Context Add-in

Sohema Tools

Sohema Tools
Decomposition

- Case Types
- TBD



Questions
and
Discussion



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