



Purpose-built to
simplify case management
and modernize human services

CORE MODULES



Prevention &
Service Referrals



Family Finding



Reporting &
Analytics



Investigation



Licensing / Provider
Management



Adult Services



Intake &
Screening



Finance



Case
Management



Childcare



Integrated Eligibility
& Benefits



Child Support

AI THAT SUPPORTS—WITHOUT REPLACING HUMAN JUDGMENT

AI is integrated throughout CaseVault to help caseworkers work smarter and more efficiently—so they can focus on what matters most.



Smarter Insights

Turn data into clear insights that support better decisions.



Automated Tasks

Automate routine work and reduce manual effort.



Reduced Admin

Streamline documentation and simplify complex processes.



More time with people

Spend less time on paperwork and more time with people.



ONE PLATFORM

A HOLISTIC VIEW OF HUMAN SERVICES

CaseVault brings human services programs together through one connected platform. From prevention, intake, and investigation to case management, childcare, child support, adult services, eligibility, finance, provider management, and reporting, each module operates as part of a shared ecosystem—not a collection of disconnected solutions.

People, families, relationships, providers, services, documents, financial information, and program activity are connected in one place. Authorized staff gain a more complete view of the individuals they serve, including their interactions across programs, while role-based access protects sensitive information.

Each module supports the specialized practices and requirements of its program while sharing common information, workflows, and platform capabilities. This creates continuity across the human services journey, reduces duplicate data entry, and helps teams coordinate services without losing the distinct needs of each program.

EVERY PROGRAM CONNECTED EVERY PERSON SEEN

CaseVault supports the work wherever it happens. Staff can access and update information from the office or the field, with mobile and offline capabilities that keep work moving when connectivity is limited. Information synchronizes securely to the connected record when service is restored.

Built on Salesforce, CaseVault can be configured around each agency's programs, policies, terminology, roles, and operating model. Shared data, integrated analytics, and flexible modules allow agencies to begin with the capabilities they need today and expand over time—while maintaining one connected view across the enterprise.

CONNECTED BY DESIGN



Holistic Case View

People, relationships, services, history, and documents—all in one connected record.



Connected Service Journey

Coordinate programs, providers, and partners across the full continuum of care.



Guided, Flexible Practice

Configure workflows to agency policy while supporting consistent, person-centered practice.



Connected Anywhere

Access and update case information in the office, in the field, or offline.

**SCHEDULE A DEMO
TODAY!**



Unifying people, programs, and services to support better decisions and stronger outcomes