



What is Case Manager?

Case Manager is a highly flexible, user-friendly, total software solution designed to meet your case management needs.

What can Case Manager do for you?

Case Manager will boost your productivity and deliver improved business outcomes, enabling you to focus on providing a quality experience for your clients.

Information at your fingertips

Instantly access the Case Manager App with a four-digit passcode so you can view and add case notes and documentation while you're on the road, and provide real time updates by creating and sending emails with attachments.

Case Manager captures case information in one place, ensuring fast and easy access by relevant employees from a central location. Icons quickly identify different types of documents: emails, plain text, word documents, PDFs, xls. Search and filter functions enable quick location of items.

Flexible, adaptable and scalable

Available on web, Windows and phone, Case Manager is designed to fit organisations of any size, with the potential to expand as your business grows.

Easy to learn, easy to use

A superior user experience is guaranteed with tailored customer onboarding, screenshare support and 24/7 online help.

Customisation gives you the competitive edge

Custom fields and tabs expand your potential to capture data. Create multiple views and change views with one click. Tailor your database by adding and editing lists to modify the information collected and reported on.

Case Manager is an all in one

- client database
- case management tool
- billing system



Easy and accurate document creation and management

Create emails, documents and reports in seconds, using the custom MS word add-in to automatically merge case fields into your MS Word and Excel templates. A consistent and systematic approach to documentation management enables a detailed trail of all your case documents.

Enhanced business efficiency

Case Manager offers a flexible approach to billing and invoicing, where activity codes and rates are configured based on the requirements of your payer. Synchronise information with accounting packages such as Xero and MYOB and streamline invoices directly to external agencies including WorkCover Queensland, Return to Work SA and CGU insurance. Additional integrations with Government agencies such as NDIS, DVA and Medicare facilitate efficient invoicing.

Improved staff productivity

Task and time management tools allow you to sort and filter tasks to help prioritise work and improve efficiency. Automated reminders help staff keep track of key completion dates (e.g. progress reports, rehab plans, quotes). Calendar functionality enables appointment scheduling and visibility of staff and services availability.

Simplify Invoicing

Create individual invoices with one click, then send via email with a second click. Create and email multiple invoices using the invoice generator and batch utility, with a copy saved to your documents to review as required.

Data Security

You own your data and we keep it safe for you with the most advanced security and privacy systems. An extensive range of security settings and features lets you determine the level of each user's access to case information and functions.

Flexible options for data analysis

Built in and customised reporting options in Case Manager enable you to track and analyse your business performance. Create custom views and export data into Excel to generate graphs and visuals.

Our customers

Case Manager has customers across Australia, the USA and UK, from the not-for-profit, government and private sectors. While the majority of our customers are health professionals, a wider range of businesses now find that Case Manager provides an excellent solution for their business.

If you are looking for an efficient, flexible and comprehensive software solution, Case Manager is the answer.

For further information, contact us on

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