



Brochure



SYSTEM REQUIREMENTS



| | |
|--------------------|---|
| Workstation- | |
| CPU: | Pentium 4 (1.0 GHz minimum) |
| RAM: | 1024 MB |
| Disk Space: | 126 MB (Allocated for Java plug-in) |
| Operating Systems: | Windows, Linux, or Mac |
| Server- | |
| CPU: | N/A |
| RAM: | N/A |
| Disk Space: | N/A |
| Operating Systems: | N/A |
| Network- | As long as the workstation can access the server host, any LAN, WAN, ISDN, dial-up connection, etc. will be sufficient. |

Comparison Chart

| | HEART LITE | HEART PRO |
|----------------------------|------------|-----------|
| Maximum # of Clients | 500 | Unlimited |
| Maximum # of Workgroups | 20 | Unlimited |
| Maximum # of Employees | 2 | Unlimited |
| Maximum # of Dorms | Unlimited | Unlimited |
| Maximum # of Beds per Dorm | 50 | 999 |
| Maximum # of Segmentations | 500 | 50 |
| Multi-Site Capable | | ♥ |
| Share Settings | | ♥ |

The **H.E.A.R.T.** (**H**uman services **E**valuation **A**nd **R**eporting **T**ools)

Family Software product line was written specifically for social service organizations with an emphasis on rescue missions and homeless service providers. This user-friendly collection of client-tracking software enables these organizations to gather the statistical data they need to operate at optimum levels.

The **H.E.A.R.T. Family Software** consists of Heart Lite and Heart Pro. No matter what size your organization may be, there is a member of the **H.E.A.R.T. Family Software** to meet your specific needs and budget.

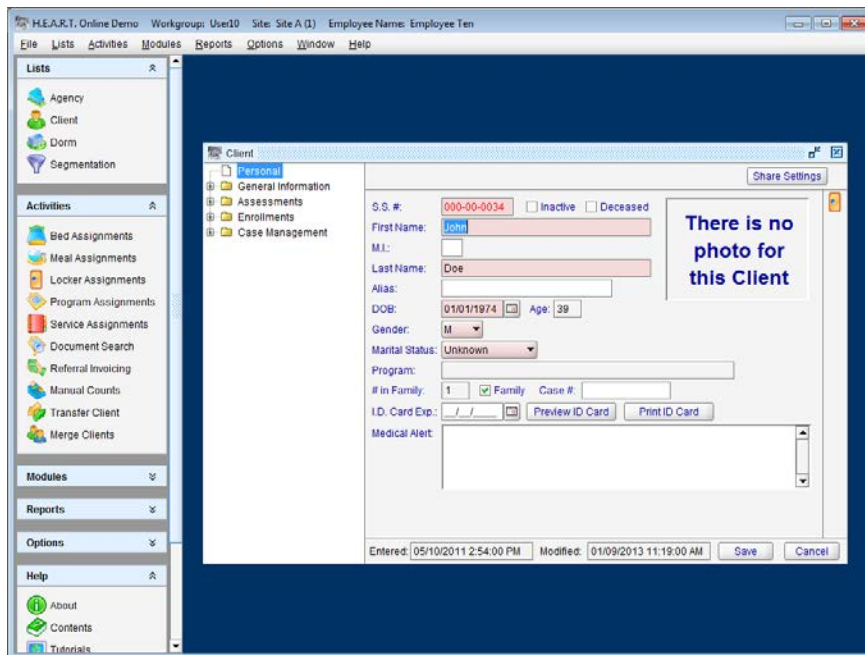
Key Benefits

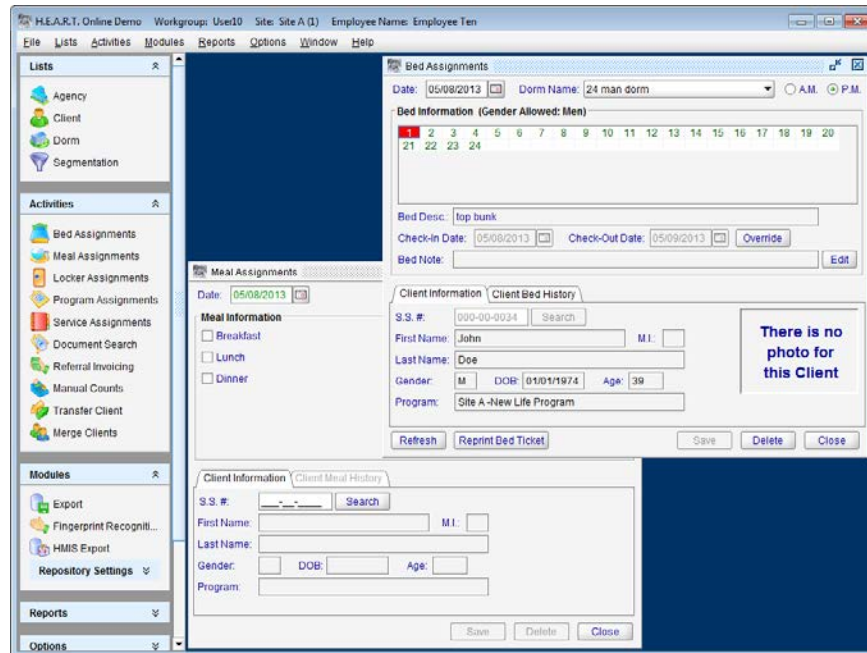
1. You will have a program that is ready for immediate use.
2. You will not have to "reinvent the wheel"; the development process is complete.
3. You will be able to be proactive vs. reactive to your clients' needs.
4. All of your information will be easily accessible.
5. Your well-informed constituents will become better informed funding sources.
6. You will enjoy screens that are easy to look at and commands that are easy to use.
7. You will have a technical support team at your fingertips, just call.



H.E.A.R.T. Pro provides the multiple-facility or multi-agency continuum with a tool to better serve their communities as well support for additional modules. Software Application Services, Inc. provides technical support and licensing options for up to an unlimited number of clients. Your database is securely stored on our cloud infrastructure and backed up on a daily basis.

By using these products you can avoid duplication of service. The client will therefore be better served by not having to answer the same intake questions multiple times as they are referred from one facility to another.





"I have been using H.E.A.R.T. for about 7 or 8 years now, and prefer this program over all the others that I have used. Its design is well thought out. The things I like most is its speed, simplicity and accuracy. I can train my people no matter what their educational status or computer literacy, they can learn to run this program quickly and with confidence, not being intimidated or frustrated by it. If they make a mistake, they can fix it quickly and easily without panic. I have several programs that I currently use to collect data; however I use H.E.A.R.T. for all my reports, having complete trust in its accuracy and reliability. I don't have to double check anything. If you run a shelter or various types of in house programs, this is the best product for that purpose. This is the only program that I have seen that does everything I want it, and expect it to do. If you are looking into purchasing a program of this type, I would only recommend this one. I have tried several; this one is the best and wouldn't bother with anything else."

Britton Kimball

Emergency Lodge Program Director
Gospel Center Rescue Mission

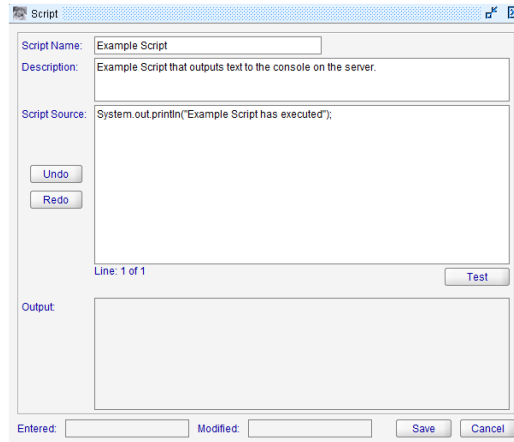
"Wheeler Mission Ministries has searched for a quality client database software package for several years. We even attempted to develop our own, but it was just never exactly what we needed until we discovered H.E.A.R.T. We went live with the H.E.A.R.T. software in January 2003 and have recently destroyed all our old manual card files and plan never to look back."

Gene Green
Senior Director of Mission Services
Wheeler Mission

Custom Scripting and Rules Engine

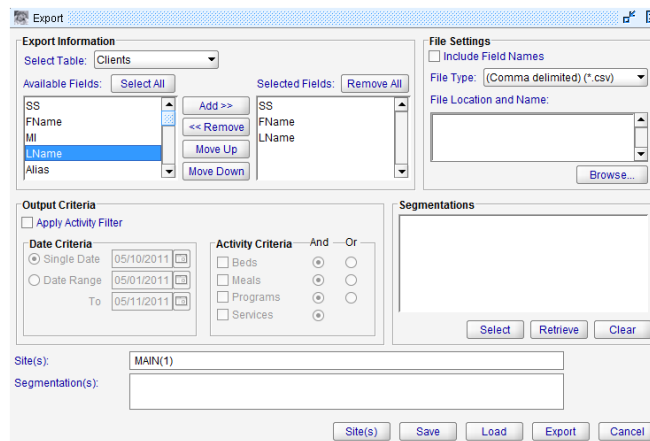
This module gives you the ability to create custom scripts for performing functions and other activities within the system. You can set rules (conditions) when a client is assigned a bed, meal, locker, program and/or service. (Requires prior knowledge of JavaScript.)

Future development plans include a scheduling portion which would allow you to schedule those custom scripts you created to run hourly, daily, weekly, and monthly or on specific days or dates.



Export

The Export module will allow you to export any combination of data from the tables/fields that this module enables. You will be able to choose whether the data is exported as a comma separated value or a tab delimited text file.



Fingerprint Recognition

This module allows a client's fingerprint to be stored for verification purposes; you can use this module to more efficiently assign beds, meals, lockers, programs, and/or services.

The screenshot shows the 'Fingerprint Recognition Settings' window. It is divided into several sections:

- Set Fingerprint Reader Status:** Includes radio buttons for 'Off', 'On' (selected), and 'Auto Assign'.
- Select Identification Screen:** Contains checkboxes for 'Client Viewer', 'Active', 'Inactive', 'Living', and 'Deceased'. It also has checkboxes for 'Bed Assignments', 'Pre-Assigned', and 'Search All Dorms'. A 'Dorm Name' dropdown is set to '24 man dorm'. There are radio buttons for 'A.M.' and 'P.M.', and an 'Auto Assign Delay' field set to '0' seconds.
- Locker Assignments:** A checkbox that is currently unchecked.
- Meal Assignments:** Includes checkboxes for 'Breakfast', 'Lunch', and 'Dinner'.
- Program Assignments:** A dropdown menu set to 'Site A - New Life Program'.
- Service Assignments:** A dropdown menu set to 'Clothing'.
- Select Identification Sources:** Includes checkboxes for 'Men', 'Women', and 'Family', all of which are checked.
- Fingerprint Reader Functions:** Contains buttons for 'Initialize Fingerprint Reader' and 'Reload Fingerprints'.
- Statistics:** Displays 'Fast Search' metrics: 'Last Retrieval Time: 0.00' and 'Avg. Retrieval Time: 0.19'. It also has fields for 'Full Search' and 'Average Current Session'.

At the bottom right, there are 'Save' and 'Cancel' buttons.

HMIS Export

This module will allow you to track and export the HUD universal data elements. You can automatically extract the data necessary for a government agency that you work with and that wants your de-identified aggregate statistics. You can track as much or as little HUD data as you want on an individual client since very little information, other than some basic information, is required. The data is exported as ".xml" (extensible markup language) file.

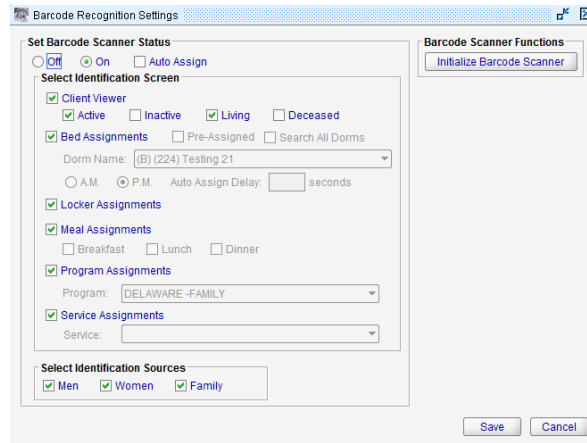
The image shows two screenshots from the HMIS system:

- HMIS Export Window:** Shows 'File Settings' with 'File Type' set to 'HUD HMIS Spec 2.7 (*.xml)'. It includes a 'File Location and Name' field with a 'Browse...' button. Under 'Output Criteria', there are options for 'Exclusions', a 'Filter by date range' section with 'From' and 'To' date pickers (both set to 04/29/2012), and a 'Filter by HMIS Program Type' dropdown. The 'Site' is set to 'DELAWARE' and 'Status' is empty. 'Export' and 'Cancel' buttons are at the bottom.
- Client Window:** Shows a client profile for 'John Doe' (ID: 000-00-0034). The left sidebar lists categories like 'Personal', 'General Information', 'Last Address', 'Contacts', 'Children', 'Household', 'Background', 'Images', 'HMIS Data', 'Vehicles', 'Assessments', 'Enrollments', and 'Case Management'. The main area displays various fields with radio buttons or dropdowns for 'Disabling Condition', 'Physical Disability', 'Developmental Disability', 'Health Status', 'HIV/AIDS', 'Mental Health Problem', 'Mental Health Problem Indefinite', 'Substance Abuse Problem', 'Substance Abuse Indefinite', 'Domestic Violence', 'Domestic Violence Experience Occurred', 'Currently in School', and 'Vocational Training'. At the bottom, it shows 'Entered: 05/10/2011 2:54:00 PM' and 'Modified: 01/09/2013 11:19:00 AM', along with 'Save' and 'Cancel' buttons.

Accessory Modules

Barcode Recognition

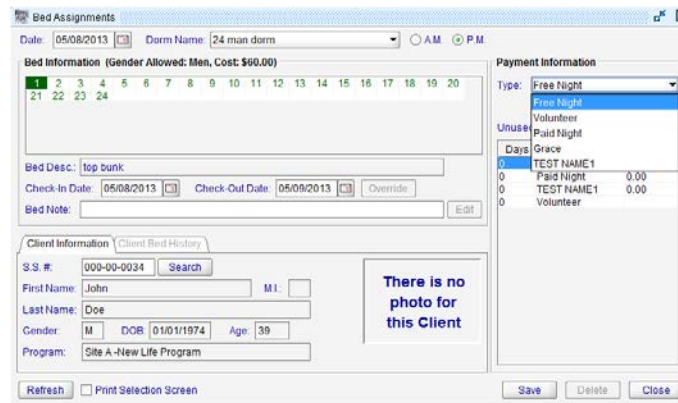
This module allows a client's ID card barcode to be used for verification purposes; you can use this module to more efficiently assign beds, meals, lockers, programs and/or services.



The Barcode Recognition Settings window is divided into two main sections: 'Set Barcode Scanner Status' and 'Barcode Scanner Functions'. The 'Set Barcode Scanner Status' section includes options for 'On' (selected) or 'Off', and 'Auto Assign'. Under 'Select Identification Screen', there are checkboxes for 'Client Viewer' (checked), 'Active' (checked), 'Inactive', 'Living' (checked), and 'Deceased'. There are also checkboxes for 'Bed Assignments' (checked), 'Pre-Assigned', and 'Search All Dorms'. A dropdown menu for 'Dorm Name' is set to '(B) (224) Testing 21'. Below this are radio buttons for 'A.M.' and 'P.M.' (selected), and an 'Auto Assign Delay' field. Further down are checkboxes for 'Locker Assignments' (checked), 'Meal Assignments' (checked), and 'Program Assignments' (checked). The 'Meal Assignments' section has checkboxes for 'Breakfast', 'Lunch', and 'Dinner'. The 'Program Assignments' section has a dropdown menu set to 'DELAWARE-FAMILY'. The 'Service Assignments' section has a dropdown menu. At the bottom, there is a 'Select Identification Sources' section with checkboxes for 'Men' (checked), 'Women' (checked), and 'Family' (checked). The 'Barcode Scanner Functions' section has an 'Initialize Barcode Scanner' button. At the bottom right are 'Save' and 'Cancel' buttons.

Client Payment

If your organization charges a nominal fee for a night's stay or collects a fee for beds and/or meals, this module allows you to track and record any payments you receive from the people you serve. The Client Payment module also has the ability to "charge" nights to specific clients as a night for which they owe a fee, owe volunteer time, or are extended a grace night.



The Bed Assignments window shows a grid of bed numbers (1-24) for a '24 man dorm' on '05/08/2013'. The 'Payment Information' section on the right shows a table with columns for 'Type', 'Unuse', 'Days', and 'Amount'. The table contains the following data:

| Type | Unuse | Days | Amount |
|------------|-------|------|--------|
| Free Night | | | |
| Volunteer | | | |
| Paid Night | | | |
| Grace | | | |
| TEST NAME1 | | | |
| Paid Night | | | 0.00 |
| TEST NAME1 | | | 0.00 |
| Volunteer | | | |

The 'Client Information' section at the bottom shows 'S.S. #: 000-00-0034', 'First Name: John', 'Last Name: Doe', 'Gender: M', 'DOB: 01/01/1974', 'Age: 39', and 'Program: Site A-New Life Program'. A message box states 'There is no photo for this Client'. At the bottom are 'Refresh', 'Print Selection Screen', 'Save', 'Delete', and 'Close' buttons.

Locker Module

Keep track of when a locker was assigned and when it's due to be returned. It will also show the client's balance on a day to day basis. Automatically calculate what amount, if any, is due when the locker is returned. The included Late Locker List report will help to see who has a locker past its' due date. Also, with the Locker Receipt List you can print out all transactions related to the locker Assignments.

The screenshot shows the 'Locker Assignments' window. At the top, the date is set to 05/08/2013. Below this is a 'Locker Information' section with a grid of 120 numbered cells (1-120) for tracking locker status. The grid shows numbers 1 through 120, with some numbers highlighted in red. Below the grid, there are fields for 'Locker Desc:' (Dorm), 'Starting Date:' (07/13/2011), 'Due Date:' (07/13/2011), and 'Locker Note:'. There are buttons for 'Override', 'Return', and 'Edit'. The 'Client Information' section includes fields for S.S.# (000-00-0034), First Name (John), Last Name (Doe), Gender (M), DOB (01/01/1974), Age (39), and Program (Site A-New Life Program). The 'Payment Information' section includes fields for Receipt # (25), Deposit (0.00), Locker Total (2.00), and Amount Paid (2.00). There are checkboxes for 'Contract Signed', 'Hold', and 'Complimentary'. At the bottom, there are buttons for 'Refresh', 'History', 'Print', 'Delete', and 'Close'.

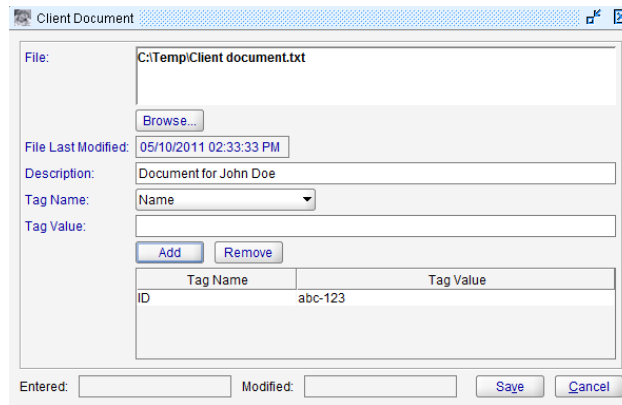
Quick Pics

Use this module to speed up the process of taking, viewing and saving your pictures by eliminating the process of saving and editing the pictures in another software program and then importing them. Works with numerous webcams and allows you to quickly and easily capture client's photos right in our software. No time consuming and expensive digital cameras needed.

The screenshot shows the 'Webcam Image' window. On the left, there is a live video feed of a man's face. Below the video feed are buttons for 'Redo', 'Save', and 'Cancel'. On the right, there is a form with fields for 'S.S.#' (00-0034) and 'Name' (John Doe). Below these fields, there are two sections: 'Photo' and 'Fingerprint'. The 'Photo' section has a 'Photo' button and a message 'There is no photo for this client' with a 'Delete' button. The 'Fingerprint' section has an 'FP Image' button and a message 'No fingerprint available' with a 'Delete' button. At the bottom, there is a 'Share' checkbox and a timestamp 'Entered 05/10/2011 2:54:00 PM' with 'Save' and 'Cancel' buttons.

Repository Module

Attach a digital copy of a form (i.e. .doc, .xls, etc.) or a scanned image (i.e. .jpg, .gif, etc.) to a client's record. There's also an area to search for files by a keyword or other criteria that you've associated with the file.



The screenshot shows a web-based form titled "Client Document". The form contains the following fields and controls:

- File:** A text box containing "C:\Temp\Client document.txt" and a "Browse..." button below it.
- File Last Modified:** A text box containing "05/10/2011 02:33:33 PM".
- Description:** A text box containing "Document for John Doe".
- Tag Name:** A dropdown menu with "Name" selected.
- Tag Value:** A text box.
- Buttons:** "Add" and "Remove" buttons are located below the Tag Value field.
- Table:** A table with two columns: "Tag Name" and "Tag Value". It contains one row with "ID" in the Tag Name column and "abc-123" in the Tag Value column.
- Footer:** "Entered:" and "Modified:" text boxes, followed by "Save" and "Cancel" buttons.

"The Durham Rescue Mission relies on H.E.A.R.T. EX to provide current and up-to-date information on all our residents. It provides our counselors and encouragers with a user friendly interface for tracking and entering useful information about where they are, what their needs may be or even where they see themselves in the future. It has also proved to be a useful reporting tool when providing needed information to staff. The support team has always responded in a timely manner and has been very sensitive to our needs."

Jim Cooper,

Anthony Dunaway

IT Staff

Durham Rescue Mission

"A valuable tool for ministry at Central Union Mission has been H.E.A.R.T. It allows for secure and fast record keeping so that we can organize ministry and services, track statistics, do better follow-up, record case notes, and overall help us to better serve our guests, students, and community. With it we can also take snapshots of data to see trends and enhance our outreach and programming."

-Rev. David R. Howard

Director of Overnight Guest Ministries
Central Union Mission

FEATURES

Reports

31 reports (1 additional report with Enhanced and Unlimited Server License, 4 additional reports with Client Payment, 4 additional reports with Locker Module, and 1 additional report with HMIS Export Module)

Segmentations (*filters for report results*) – Every **H.E.A.R.T.** product includes multiple pre-made reports. Within each report, the user is able to determine a variety of parameters or filters.

Intake Recording

Auto Assign Social Security Number – One manner in which **H.E.A.R.T.** products sort client information is by Social Security Number. If a client does not know his/her Social Security Number when entering your facility, **H.E.A.R.T.** products will automatically assign a 9-digit number. This number can be edited at a later date or left to stand as an internal identification number. Assigned numbers appear in red on the client's screen to eliminate potential confusion.

Auto City and County Entry – The user types in the zip code and the city and county appears in the appropriate boxes.

User Defined Lists – 40 Lists (3 more with Client Payment Module and 1 more with Repository Module). The organization's appointed program administrator has control over client intake information. The administrator can tailor various lists with multiple customizable entries. These lists include tracking information such as addictions, drugs, programs, etc.

Program Designations - If a facility provides a program/service for a set amount of days, the administrator can designate that length of time for calculating purposes. Every time that program is entered for a client, a properly calculated program/service ending date will be displayed on the client record.

Images – It is possible with **H.E.A.R.T.** products to add .gif, .jpg, .png and .tiff images from your computer to client records.

Administration

Security Clearance – The administrator security workgroup gives the administrator the ability to completely customize the amount of access to client information by the other workgroups. In addition to having the option to restrict access to men, women, or family records, the administrator may also limit or allow access to individual segments of the client record and reports.

Administrator definable fields – **H.E.A.R.T.** products have always had administrator definable checkboxes and dropdown lists.

Administrator definable panels – Four of the client information panels can be renamed by the Administrator.