ActivityInfo

Streamline your Case Management System with ActivityInfo

Starting shortly, please wait!

Presenters

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Executive Director

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Commercial Director

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Agenda

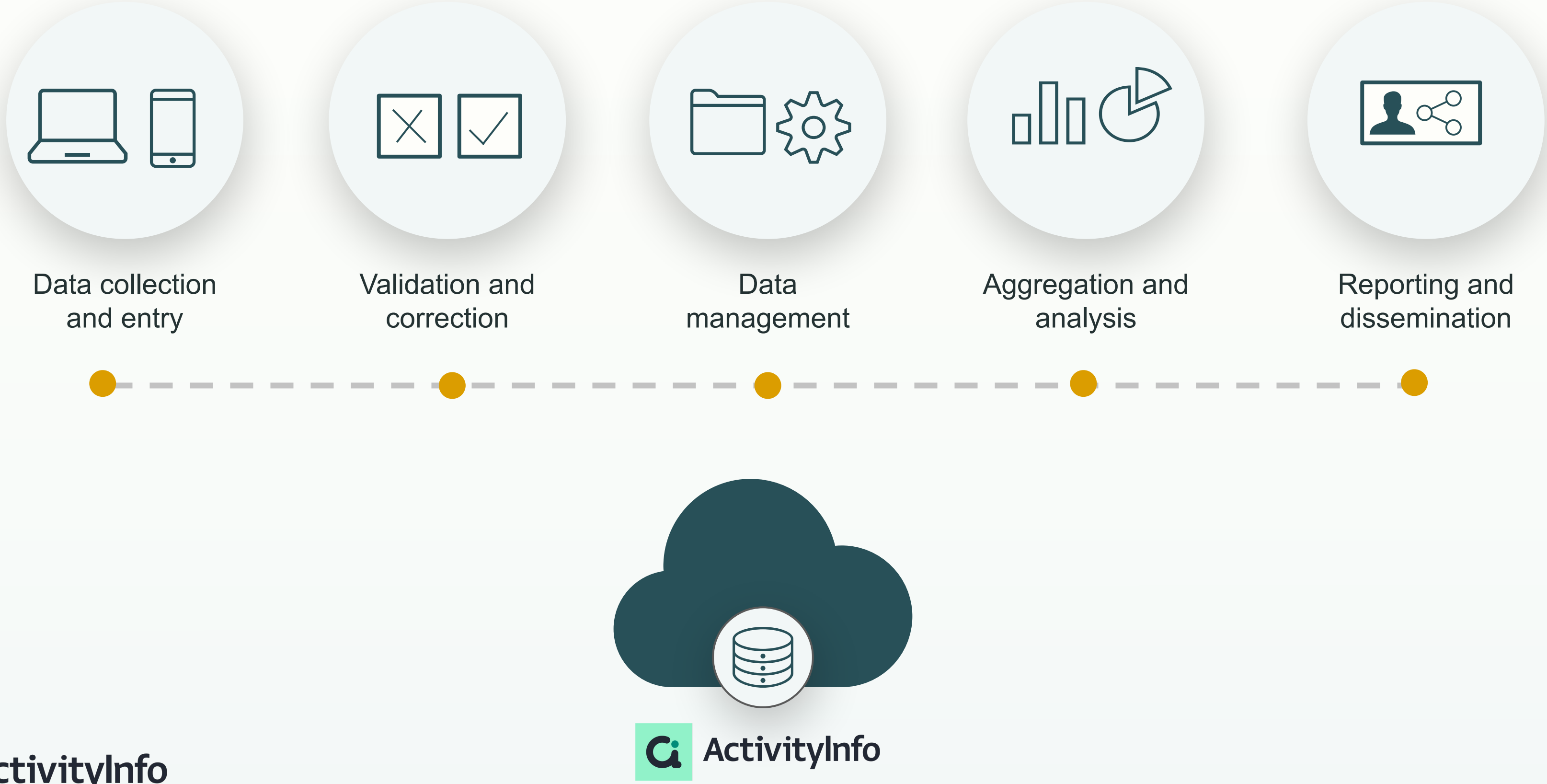
- BeDataDriven + ActivityInfo
- ActivityInfo for Case Management
- Demos:
  - Electronic Medical Records (EMR) template
  - Protection case management (plus MEAL) template

BeDataDriven + ActivityInfo

BeDataDriven mission

Provide social impact organizations with a standard, easy-to-use and comprehensive data management platform so that as many organizations as possible can become data-driven to achieve better outcomes for rights holders worldwide.

BeDataDriven pursues this mission by building and helping organizations implement ActivityInfo.



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ActivityInfo deployment options

SaaS: Fully hosted by ActivityInfo in the EU — secure, maintained, and ready to use

Self-managed: Deploy ActivityInfo on your own infrastructure for full control

Sovereign Managed: We help you deploy and maintain ActivityInfo in an in-country data center or on premise

ActivityInfo for Case Management

Case Management Lifecycle in ActivityInfo

Intake / Registration	Assessment & Planning	Implementation / Action	Monitoring & Follow-up	Closure / Transfer
Capture new cases with unique IDs and essential details.	Record needs, risks, and action plans using linked and conditional forms.	Track services delivered and referrals through sub-forms and linkages.	Use dashboards and reports to review case progress and quality.	Manage case completion with controlled status workflows.

Reporting & Learning
Aggregate insights to inform program improvements.

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…ActivityInfo supports the full case management cycle with configurable forms, secure permissions, and real-time reporting.

Intake / Registration

Capture new cases and assign unique identifiers

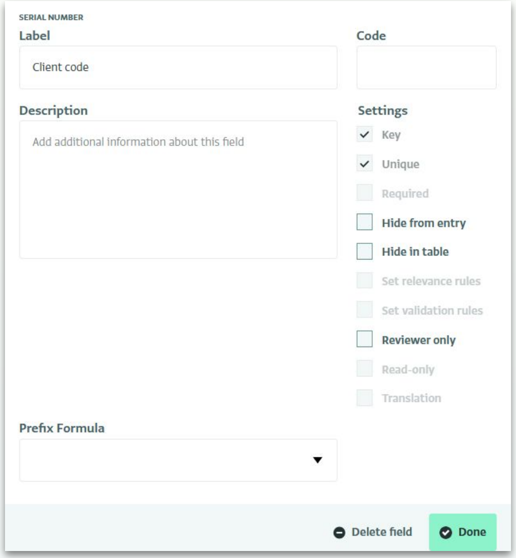
Key Features:

- **Customizable forms** for client and case data
- **Serial** and ***key fields*** for unique case IDs
- **Reference fields** to link clients, households, and locations
- **Role-based permissions** for data access and confidentiality

Advantages:

- Simple data entry
- Auto-generated IDs
- Secure structure for sensitive information

Typical Users: Caseworker, Intake Officer



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Assessment & Planning

Document client needs, risks, and plan interventions

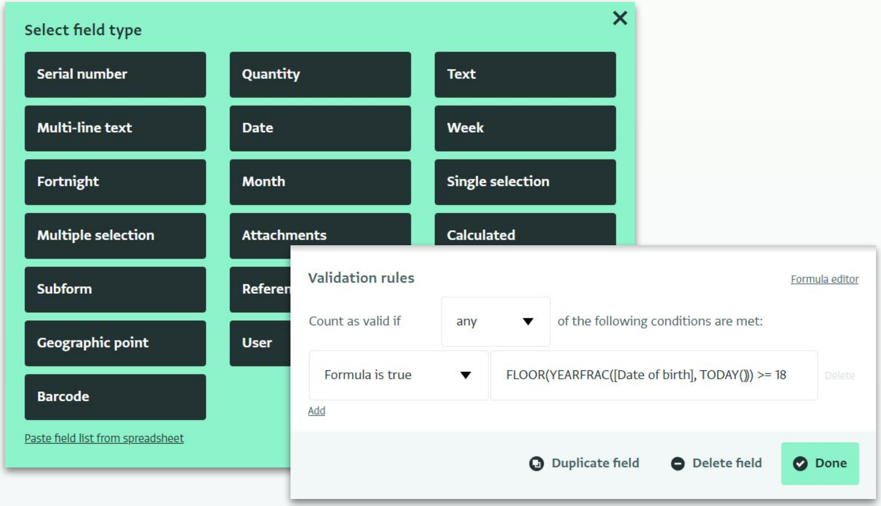
Key Features:

- **Sub-forms** for assessments and action plans
- Conditional (**relevance**) and **validation rules**
- Structured **field types** for accurate scoring and timelines
- **Granular permissions** by user role

Advantages:

- Logical workflows
- Relevance-driven forms
- Clear links between assessments and actions

Typical Users: Caseworker, Supervisor



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Implementation / Action

Track interventions, services, and referrals

Key Features:

- **Related forms** for connectivity
- **Audit trail** for accountability
- **Offline data entry** via ActivityInfo mobile app
- **Controlled editing** permissions

Advantages:

- Easy tracking of services
- Connection between cases and interventions

Typical Users: Caseworker, Field Officer

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Monitoring & Follow-up

Review progress and adjust plans as needed

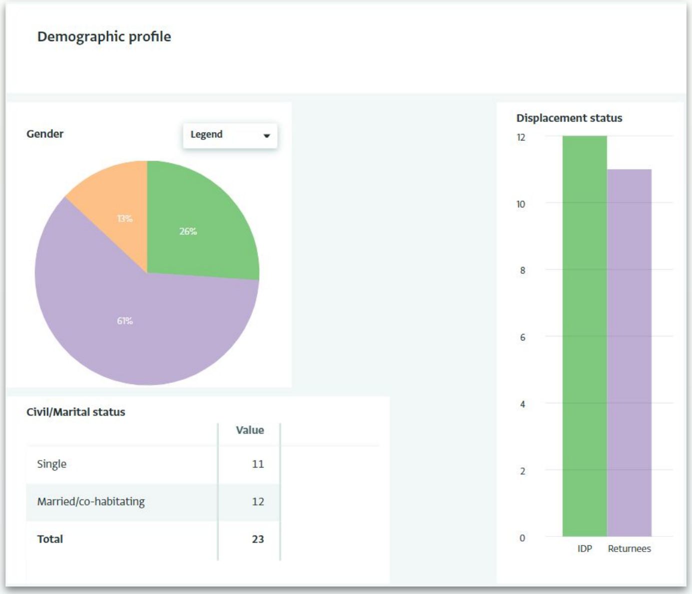
Key Features:

- Built-in **dashboards** and **pivot reports**
- **Calculated fields** for aggregation and progress tracking
- **Filters** for supervisor-specific case views

Advantages:

- Clear visibility of:
  - caseloads,
  - progress indicators
  - performance summaries

Typical Users: Supervisor, Program Manager



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Closure / Transfer

Close or transfer cases once objectives are met

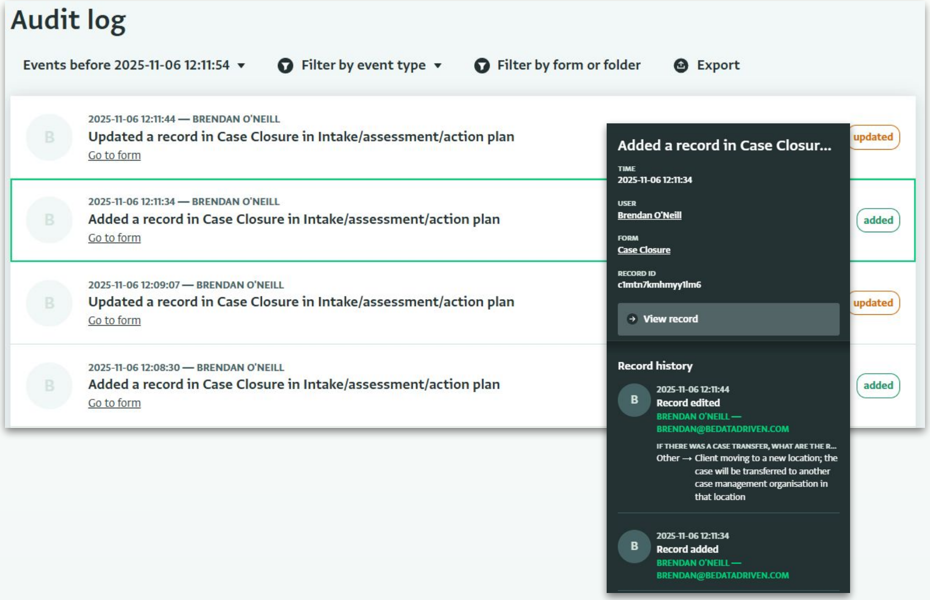
Key Features:

- **Status fields** to mark closure or transfer
- **Relevance rules** for closure-specific fields
- **Audit logs** and **locks** of closed records

Advantages:

- Structured closure process
- Integrity of historical data
- Clarity in case outcomes

Typical Users: Caseworker, Supervisor



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Reporting & Learning

Generate insights and inform program decisions

Key Features:

- **Real-time** dashboards, charts, and maps
- Export and **API integration** for advanced analysis
- **Aggregation tools** for donor and management reporting

Advantages:

- Quick access to performance data and visual summaries
- Secure aggregation of sensitive case information

Typical Users: MEAL Officer, Program Manager, Donor Reporting Staff

Process and Quality Report

Indicator progress

Go to analysis

Measures	Value
PQ-01	100.0%
PQ-02	24
PQ-03	24
PQ-04	16
PQ-05	95.8%
PQ-11	100.0%
PQ-12	100.0%

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Summary and Key Takeaways

ActivityInfo provides a **flexible**, **secure**, and **scalable** environment to manage the full case lifecycle — from intake to reporting — without imposing a fixed data model.

It **adapts** to your workflow and **evolves** with your program needs.

Electronic Medical Records (EMR) template

Protection case management (plus MEAL) template

Estimated investment - full implementation

Software - €3700

- Unlimited data hosting
- Unlimited reports
- Unlimited collection links
- 5 full users
  - Information/data specialists
  - M&E staff
- 15 basic users
  - Caseworkers
  - Field officers
- Technical support

Implementation - €3125 - €6250

- External onboarding support
  - Data design
  - ActivityInfo configuration
  - System testing
  - System training

Total first-year investment

	Hours	EUR
Software		3700*
Implementation support (external)	25-50	3125-6250
Implementation support (internal)	40	Variable
Total	*65-90*	*6825 - 9950*

**Only annual recurring cost*

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Questions?

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