Vibrant Emotional Health/Lifeline CRM & CCS: Key Features and Functional Requirements (June 2021)

V!brant Emotional Health

Features and Requirements	CRM	CCS
Core Functionality	● Clinical Assessments ● Information and Referrals ● Crisis Plans and Safety Plans ● Mobile Crisis Team (MCT) Referrals ● Client Records with Minimal Data, Follow-Up Activities, Appointment Tracking, Call Notes	● ACD, Interactive Voice Response (IVR), Visual IVR ● Omni Channel (Calls, Chats, Text, Email) Combination, Integration and Uniformity (Growing from Current PureConnect Uniformity on Chats, Text) ● Skills-Based Routing
Data	● Reporting Platform (e.g. Tableau) ● Standard and Customizable Report Capabilities	● Custom Reporting and Dashboards ● Real-Time Monitoring
System Access and Controls	● User Role Hierarchy and Permissioning ● Single Sign On Supportability (SSO) and Integration	● Configurable Role Based Access ● SSO Integration
Administration	● Management Administration Capabilities (Drag and Drop) ● User Capability Configuration ● View, Add, Edit, Activate, Inactivate, Delete Functions ● Audit Trail History	● Quality Management/Optimization ● Administrator Application (Drag and Drop) ● Workforce Management ● Audit Trail History
Infrastructure	● CCS and External Integration / API Capability ● Cloud / Scalability Operations and Capacity ● Integrated Vendor / Vibrant Support Capability ● Artificial Intelligence Capabilities for Future Usage	● CRM and External Integration / API Capability ● Telecom and Data with Carriers, Intermediaries ● Cloud Based and Disaster Recovery / Availability ● Integrations / APIs