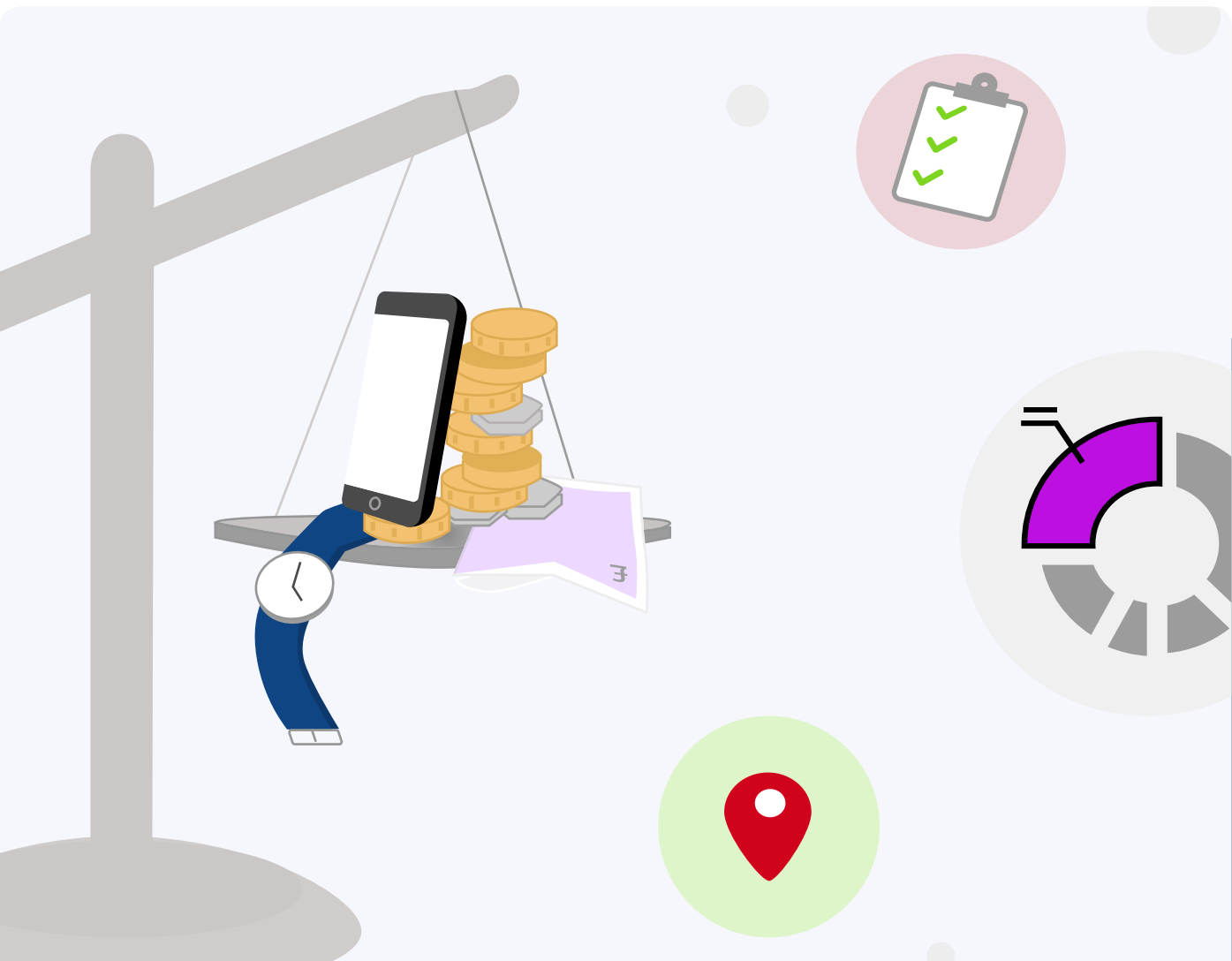


Buying Guide

# 10 Questions to ask when evaluating Home Care Management Software

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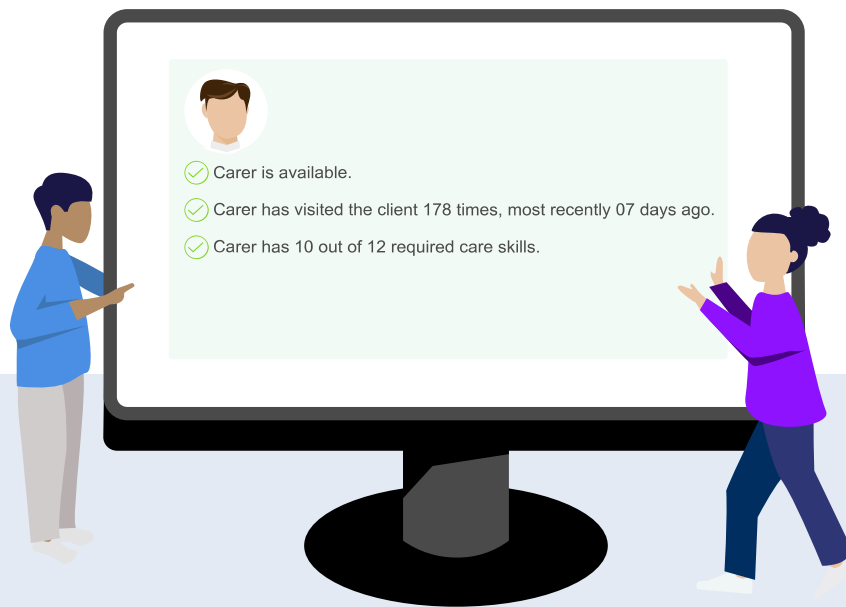
# Overview

This guide is designed to ensure you maximise your investment in home care management software. Whether looking for a simple staff rostering solution, or a more comprehensive care management solution, it's worth considering the relevance of each question and posing it when evaluating each scenario.

New software means a new way of doing things, so you need to be certain that this is the best possible way for your agency. Consider the impact of these changes on quality of care delivered to your service users. Also, consider your carers and their day-to-day challenges and how this helps you manage the business overall.



These questions are designed to help you dig deep into the potential value of a new system. However, it is also important to seek out case studies, testimonials and reviews to hear how long term users feel about the solution in question; from implementation and training, through to ongoing support.



# #1: Schedule, Roster and Rota

At the heart of any care management solution is the schedule and roster. Whilst a top-level “tell me about how your scheduling, roster and rota generation is done” may yield valuable insight, you may want to refine this further.

Common requirements relating to the schedule are:

- Can repeating call patterns be set with variation between weeks?
- Can service user preferences, carer preferences, skills and current location be used to determine the best carer to allocate to each call?
  - Will alerts be flagged if a poorly matched carer is assigned to a call?
  - Can the system make automatic suggestions of carers for each call?
  - Can the weighting of each item be set – e.g. specifying that having the right skills is more important than carer preferences?
- How is the roster presented, can you drag and drop to allocate carers to calls?
- Can calls be grouped into runs, when several are located close together?
- Is travel time between calls calculated and shown?
  - Will alerts appear if there is insufficient time to travel from one appointment to another?
- How easy is it to reschedule, or allocate the call to a new carer, if ad hoc changes are required?
- How are individual rotas created and distributed?
  - How are carers notified of ad hoc changes to their rota or call details?
  - Can carers access their rota while they are offline?
  - Can associated documents, service user details or eMARs be shared via the rotas?

# #2: Invoicing

Using the same system for call scheduling, travel calculations and call monitoring means you have very precise information about staff time travelling to and attending calls. This information can be used in the invoicing workflow to generate accurate invoices in just a few clicks.

Ask the right questions to fully explore the invoicing capabilities of each care management solution you are evaluating. Use the following questions to better evaluate invoicing options.

- Does the system generate and send invoices, or do you need to connect to an external solution to enable this?
  - If it does, can it produce and send electronic invoices (e.g. as a PDF attached to an email)
  - Do the invoices look professional? Are they branded for your agency?
- Can travel time, travel distance (or both) for all relevant calls be included in each invoice?
- How does the invoicing function support multiple funders?
- What flexibility is there around customisation of rates for call attendance and travel?
  - Will invoices reflect rate changes which vary based on time thresholds or type of care?
  - How easy is it to change VAT rates across different items?



- Can reports be generated to show invoicing status?
- Are invoicing and associated rate changes logged against the user who made them? If previous changes need to be investigated, how easy is it to see who changed what and when?

# #3: Travel Calculations



Travel between appointments is clearly a fundamental requirement in domiciliary care. Investing in a system which provides time, distance and even cost calculations for travel can improve both scheduling efficiency and invoicing accuracy.

Select a home care management system which relies on an underlying mapping solution you can trust and provides useful calculations to support the timely delivery of care. Dig into the travel calculation features by asking about:

- What mapping technology (e.g. Bing Maps, Google Maps, etc.) underpins the travel calculations?
- Are travel calculations integrated with call scheduling – to ensure optimal travel time and intelligent allocation of carers to nearby calls?
- Can you see, at a glance on a map, where all your carers (or specific carers) are at any one time? This may well require call monitoring to be enabled.
- How are travel calculations used to guide carers to take an optimal route from one call to the next?
  - Does the solution offer an app with sat-nav like navigation capability?
  - If traffic conditions change, will travel recommendation update to aid carers?
- Is travel distance, time or even a combination of the two used in invoicing and payroll calculations?
  - Is this automatic?
  - What options are there to customise this for each carer or service user?
- Are travel preferences set for each carer – perhaps some travel by car and others use public transport?

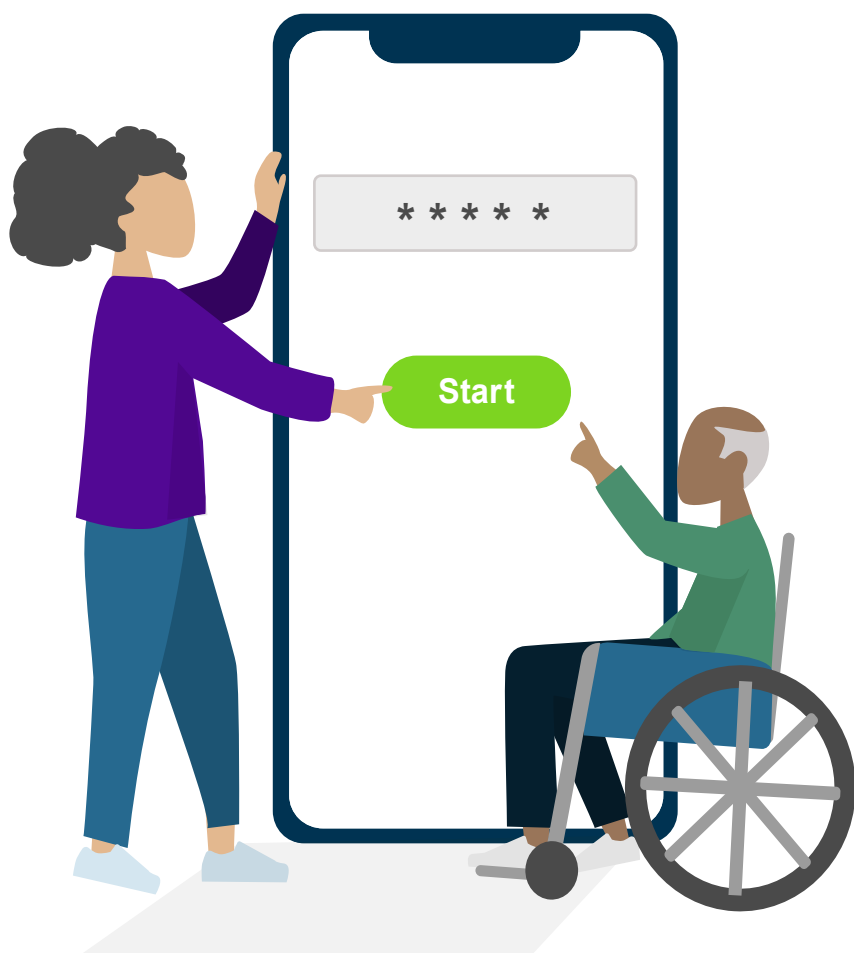


# #4: Call Monitoring

Knowing exactly where each carer is, at any given moment, and the time spent at each call is a big plus for effective management. There are a variety of ways to achieve this. Using a mobile app, NFC technology or even calling via a landline can help log call attendance reliably and accurately.

Go beyond simply asking whether the care management solution offers call monitoring, ask about the detail such as:

- What call monitoring options are available via the solution and do any require third-party integration?
  - Can carers record start and stop of calls via a mobile app?
  - Is there NFC (or similar) technology call monitoring available – so carers can ‘tap in’ and ‘tap out’ of each call location (like a London Oyster card or contactless payments)?
  - What options exist for scenarios where carers are offline, do not have a smartphone or app, or NFC technology to track call start and stop?



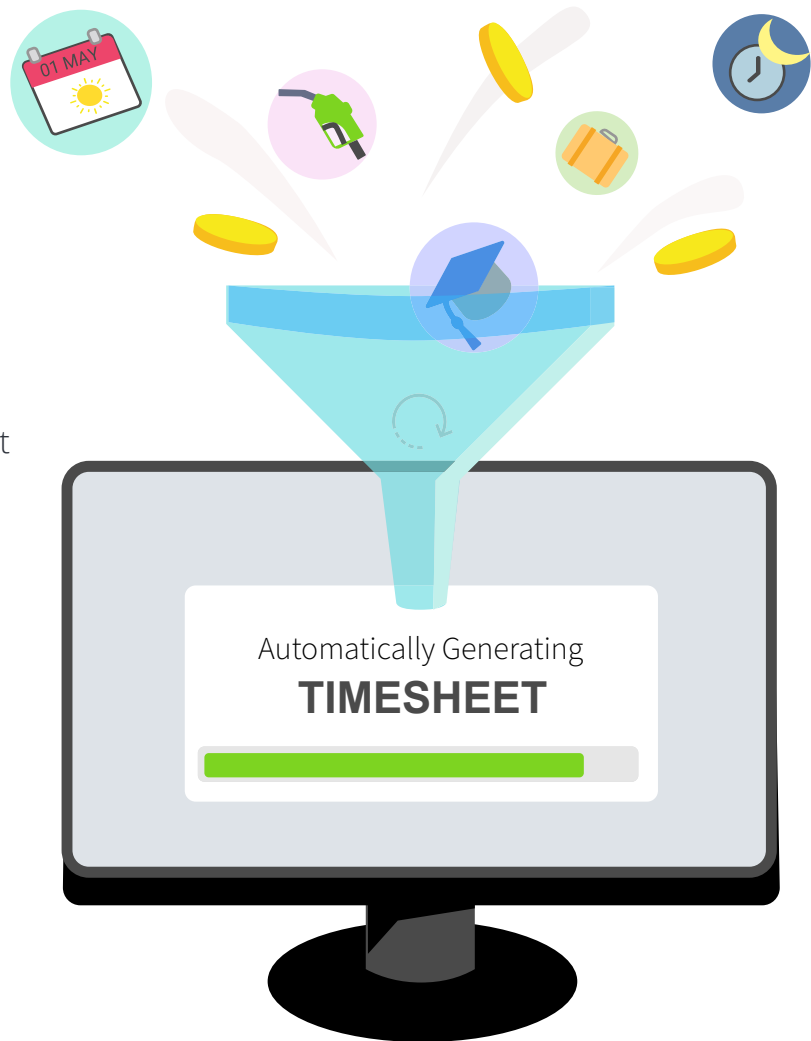
- What is the cost per carer, cost per call or other pricing structure for call monitoring?
- If your local authority requires the use of CM2000 call monitoring, how easily can the solution integrate with this?
- If carers already use a point-of-care app like PASSsystem or Birdie, can the care management system work as a back-end to integrate with these front-end apps? How easy and costly is this integration?

# #5: Timesheets

Asking carers to complete their own timesheets not only creates admin time to process these, but also presents a risk of human error. A modern home care management solution should be able to export timesheet data for payroll purposes based on each carer's rota. Call monitoring data can be used to further refine and improve the accuracy of this data.

Ask how each home care management solution supports the payroll process via timesheet calculations for each carer. More nuanced questions around this topic could include:

- How are travel calculations taken into account for timesheet data?
  - Is travel time, distance or both used?
  - Is it possible to handle different rates of pay when distance, time or other thresholds are crossed?
- Is training time, holiday, or other internal admin time recorded and factored in when producing timesheets or data for payroll?
- How well does the system integrate with, or allow data export for, your payroll system?
- Can you determine minimum-wage compliance via a report or other technique?



# #6: Record Keeping

For every carer and every service user there will always be corresponding records to hold on file. Whether these are certificates for training, medical records, risk assessments or DBS checks, they need to be stored securely. In many cases these records will expire after a specific timeframe. A complete home care management system should offer a way to store, retrieve and even flag up records ahead of their renewal date.

Dig into how each system handles record storage with questions such as:



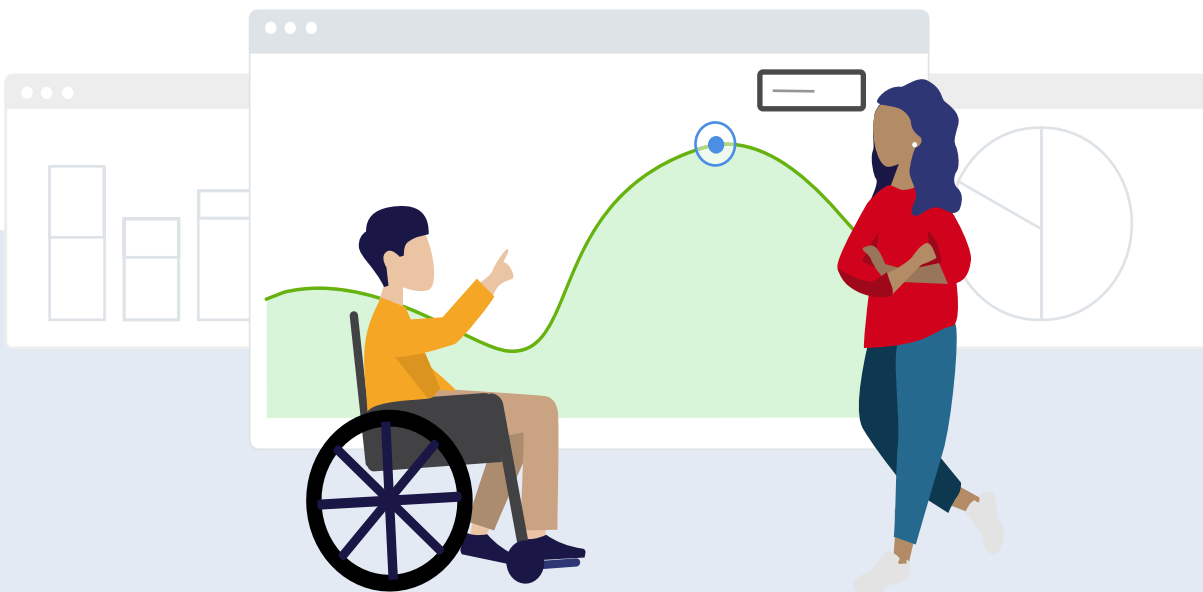
- What type of documents can be stored against each carer and service user?
- Can you set an expiry date for records?
  - If so, can an alert be triggered some time(s) ahead of this – to encourage renewal or update of the record?
  - Can alerts for record expiry be sent out via email, SMS or other options?
  - Can a report be generated to identify upcoming record renewal requirements?
- How secure are uploaded records?
  - What type of back-up and availability procedures are in place to prevent their loss?
  - How well encrypted are the uploaded records?
  - What is required to gain access to these records?
- Can records be assigned to calls in a carer's rota?



# #7: Reporting and Data

Management and reporting go hand-in-hand. Your home care management system should allow you to report on all aspects of care delivered and those who are delivering it. Seek out care management solutions with the flexibility to either tailor your own reports or export raw data to run more complex reports via Excel or other tools.

The following questions can provide a good indication of how much value the system offers through reporting and data access:



- How many pre-built reports are available to run from within the system?
- Can reports for CQC requirements be run quickly – e.g. staff training status, or lists of documentation for each service user or carer?
- Can you generate a report to show holiday bookings or remaining entitlement?
- If using call monitoring, can you export reports to identify punctuality issues before they become too serious?
- Are there reports for financial management?
- Are there reports to prevent overworking or non-compliance with the minimum wage requirement?
- How easy is it to export raw data in a format you can work with, outside of your care management system?

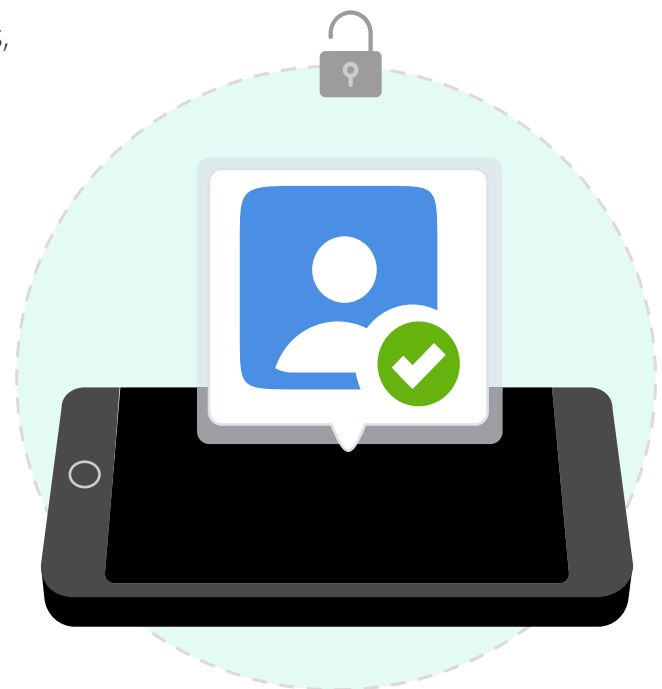
# #8: Licensing and Access

Perhaps one of the most pressing questions when evaluating solutions for home care management is how it is licensed and how much will it cost? Whilst there are considerable cost savings possible through more efficient management of care, some management solutions can be prohibitively expensive.

Understanding the way in which all users of the system will access it is also important, whether this is via web browsers, app interfaces or just via specific computers.

Consider the following questions to better understand how each solution is licensed and accessed.

- How is the solution licensed, is this per administrator, per carer or some other way?
  - How much is this for each license?
  - Are there price-breaks for larger volumes of licenses?
- Are licenses concurrent or individual – i.e. can they be used by many different users, but not at the same time? Concurrent licensing can save considerable costs if users do not need to access the system at the same time.
- Do different license tiers exist for different types of access? What are the cost of these?
- What is the period of the license, is this monthly, annual or some other length of term?
  - If a license requires lock-in for a year (or more), ask why this is the case.
  - If licensed annually, are there discounts for paying monthly?



- What exceptions or extensions are there to the license – will you ever be charged more because you have crossed a usage threshold?
- Are there any bolt-on extras or modules you may need in the future? How will this affect the total cost of ownership?
- How is the solution accessed?
  - Is it installed on one or more computers?
  - Is it cloud-based and accessible from anywhere provided you have the correct login details?
  - Is there an admin side to the solution and a separate app or interface for carers?
  - Are there different tiers of access, via different logins or applications for different office users (e.g. financial vs. management)



# #9: Setup, Training and Support

The more powerful a solution, the more training users may need. It is important to understand the details of what training and support is provided and what the costs are (if any) for this. Larger home care agencies may require more set up and training time to get the most out of a given system, so this needs to be taken into account when making estimations of the total investment to get up and running.

Identify the likely requirements and costs by asking questions like:

- How long does the set up process typically take?
- What steps are involved in setting up the new system and will there be any assistance with these?
- Are there set up costs?
- What training is provided, how long does this typically take and are there costs associated with this?
- With online training, will this be recorded and available for reference after the session?
- If further training is required, how can this be arranged and what are the costs?
- Is there a manual, user guide, e-learning or other educational/reference materials?
- How is support provided? Is this telephone, online (chat) and email support?
- Is there 24/7 support, or office-hours? Are there different levels of support available at different times?
- Is there a limit to free support and how is support charged for beyond this?
- Is there a dedicated account manager or customer success manager to ensure successful set up, training and ongoing satisfaction with support and service levels?
- Is there a service level agreement (SLA) and how can this be tailored to meet your specific requirements?

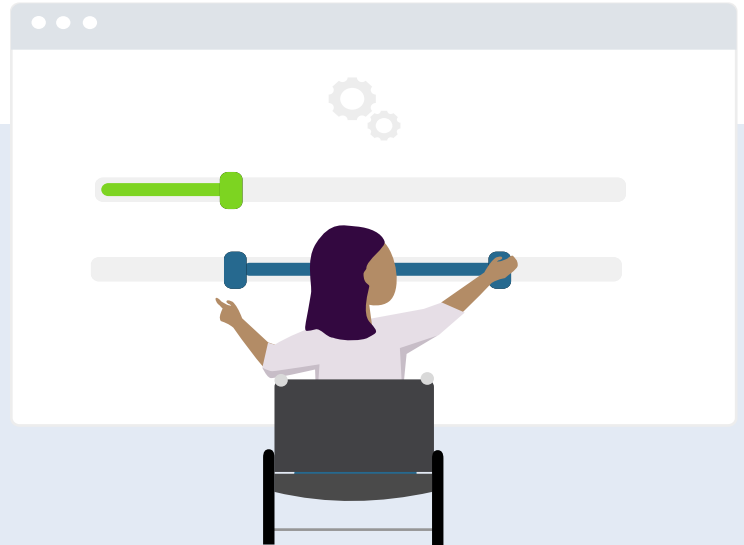
# #10: Customisation and Control

Every domiciliary or home care agency is different, so the ideal care management system will vary according to these needs. Core functionality may be common across most agencies, but the capacity to tailor a solution to your needs can make a big difference.

It's not just differences between agencies which need to be taken into account. Different users may only want to access their area of the system, or you may want to limit access for specific users for security, GDPR or other reasons.

Consider the following questions to determine whether each system offers the customisation and control you need.

- Can each user have a different view of the system – locking them out of certain areas and granting access to others?
- Can a super-user, or each individual user, customise how various aspects of the system are configured? For example, could the schedule be set to display a week at a time vs. a month at a time?
- Which aspects of the system can be customised and what are the limits on these?
- If areas need to be customised, yet are not customisable by default, what are the costs for bespoke customisation work?
- What happens when a user leaves the agency, or a device with access is lost/stolen? Can the account or device be locked out, or even scrambled, quickly?
- Is there a log of all activity on the system, indicating who made what changes and when? GDPR can require this level of accountability, so what controls can be put in place if this is not supported within the system?





## ➤ Next Steps

Armed with the questions from this document, you should be able to dig deep into each care management system you evaluate. Score each solution – perhaps using a spreadsheet containing these questions (or your own variations) – to weigh up the pros and cons before requesting a demonstration.

When you move forward with a hands-on demonstration, consider testing with real scenarios and even real data (as long as you are allowed to from a GDPR perspective). The demo should be the final stage in providing you with the confidence to move forward (or not) with the solution you are evaluating.

Talk to CarePlanner about any of the above points, or arranging a free demo at a time which suits you.