Business software critical to community care

For the 43,000 people in the ACT looking after a family member or friend with a chronic condition, a disability, a mental illness or who is ageing, reliable information about services to support their caring role is vital.

Since 1992, Carers ACT has been delivering information and referrals to family carers on aged and community care, as well as providing specialised carer support services, such as respite, counselling and advocacy in the Australian Capital Territory.The 75 employees of this not-for-profit organisation deliver more than 20 programs funded by both the ACT and federal governments. Both the ACT and federal governments require reports of a different nature and at different times, to ensure that allocated program funds are properly spent and meet program service delivery outcomes. Complex quarterly reports are also required by Carers ACTs board of directors, to ensure accountability. Funding, naturally, is limited. There are some services that are in high demand, but the funds arent available for them, says Carers ACTs Finance and IT Manager. The government projects that the number of ageing people is going to increase in the next decade, so its very clear that the demand is going to increase in the long term.Too many systemsCarers ACT employs more than 20 people doing impact assessment to determine clients needs and which program can support them, or whether to refer them to another organisation. It also runs a centralised booking service for respite, so carers can have a break, and other carer services. Before Greentree, Carers ACT was battling with too many duplicated tasks, as well as service and reporting difficulties. They used MYOB for finance, plus seven Access databases with separate CRM and service management support. These fragmented systems couldnt provide the consolidated view of carers needs that is essential to support a case for funding. Multiple data entry consumed too much staff time, and the reporting process was inconsistent and inflexible, with doubts about the integrity of data.You couldnt see the whole picture of a particular client, because the client information was captured in a different database, the Finance and IT Manager explains. It was difficult also for us to provide an efficient referral process because we couldnt see what support or resources the client already had. If the client told us they didnt want a particular service anymore and we didnt enter the information in the right database, theyd have to tell their situation or needs to Carers ACT staff again. This was frustrating for them and a waste of Carers ACT resources. From the integrity perspective, Carers ACT desired to make sure that the reports reflected real life, because they had to be entered into two different databases service delivery and accounting.Carers ACTs shopping list for a new system included a integral database encompassing CRM, HR and Finance, the capacity to accommodate changes in the requirements of funding bodies, and integration with other communication, authorisation, eServices and security technologies. They also were required to be able to report electronically into the central database of the Australian Government Department of Health and Ageing.The shortlist of contenders included Greentree, Oracle, Care Manager (from Database Consultants), and IMS. Greentrees partner sealed the deal by offering all the required functionality at an affordable cost. Others seek the benefitsThe implementation required careful scoping of the project in order to secure funding, and special customisation of the CRM module, to accommodate various booking requirements and payment options. This work has brought extra dividends; various Greentree components are now being deployed by other Carers Associations, and at Lutheran Community Care in South Australia.Everyone across the organisation is using Greentree, and each function of Greentree can be used for different programs and also on different levels, the Manager says. Having everything in the one system gives us the whole history of the client, and the staff can then assess what best suits their needs.FREE (Greentrees Financial Reporting Engine in Excel) is really good for us, because each program has its own budget related to its funding source. FREE allows them to view how theyve spent their funds; and they have live data so they dont exceed their budgets.The Manager says with Greentree, Carers ACT has the capacity to capture data about its existing services, as well as expand its Greentree activities, for example improved ability to communicate with clients by email, SMS and social media. It is also better equipped to handle any changes in government funding requirements. As a result, Carers ACT is in a strong position to demonstrate our ability to meet program delivery and reporting requirements and to secure future funding, as well as making sure were delivering services effectively to our clients now and in the future.

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