

CDC Strategies & Ideas

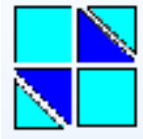


A look across Australia at ideas, plans, tips and different ways of thinking from providers with a focus on requirements, reporting and how software like SMS with integrated CDC Module can help with CDC and Home Care Package Reporting

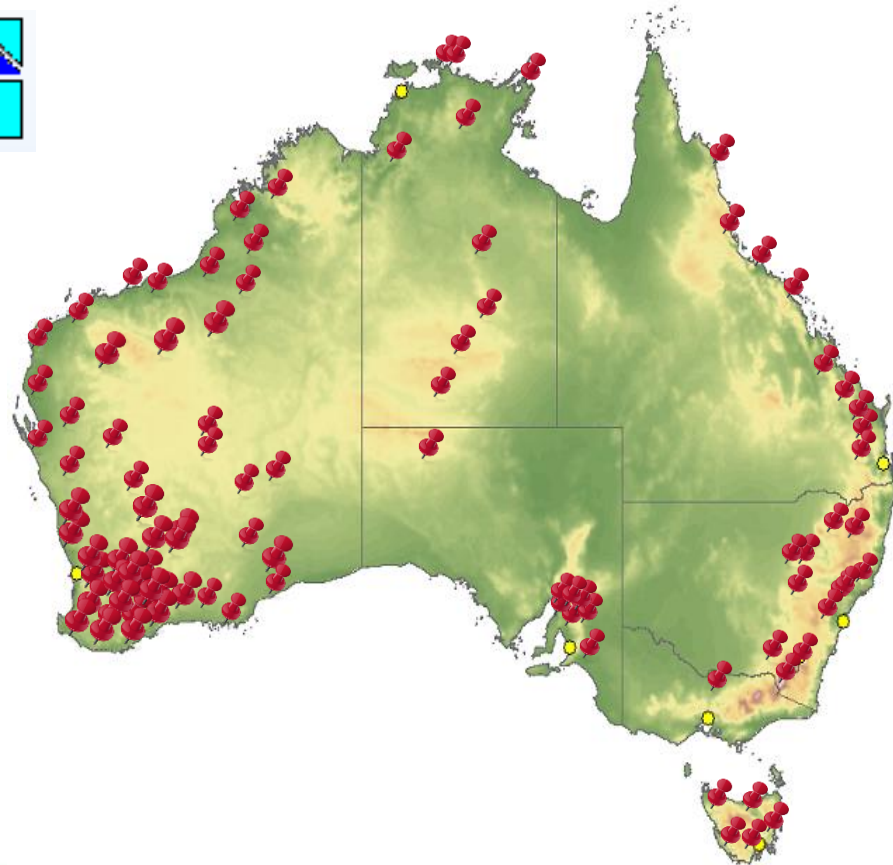
Racheal Enkel
Senior Consultant

Who is Alchemy Technology?

Provider of
Service
Management
System (SMS)

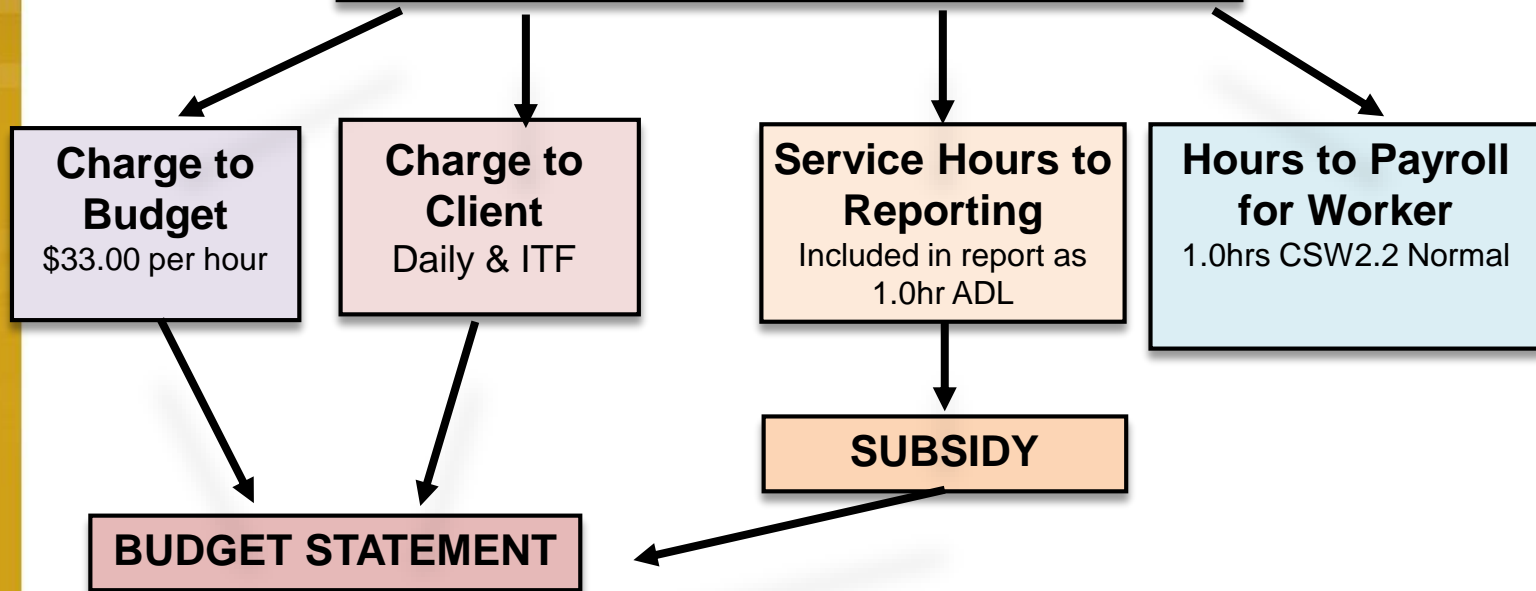


Providing
Development
and Support for
SMS to
Over 200 Sites
Across Australia



The CDC Process

Client Services Planned & Rostered
E.g. Monday 1hr Personal Care Every Week



What makes up the budget?

Income	Expenses
<p>Subsidies Government Contribution per day Can be reduced by income tested fee</p>	<p>Charges – Services, Purchases etc. Service Delivery, Travel Costs, Staff Management costs etc.</p>
<p>Supplements Dementia & Cognition, Veterans , Financial Hardship Remoteness (ARIA Score), Oxygen & Enteral Feeding</p>	<p>Administration Charges Administration of Budget, Management of package funds, Case Management</p>
<p>Client Contributions Daily Fee - to be negotiated with provider up to 17.5% of standard pension rate (currently \$134.80 per fortnight)</p> <p>Income Tested Fee As advised by Centrelink Assessment</p>	<p>Contingency Setting aside the 'rainy day' fund</p>

Administration Charges

Administration charge to cover Administration duties such as:

- Paying Invoices
- Scheduling Appointments
- Preparing the Monthly Statement

Administration Charges may vary based on:

- Level of Case management
- If Third Party Provider is used
- If Equipment is purchased or hired




Client Contributions

A care recipient can be asked to pay a fee for the package based on their income.

Daily Fee - maximum fee which can be charged is 17.5% of the basic rate of single pension.

Income Tested Fee- Client may be requested (by Centrelink) to pay additional fees up to to 50% of any income above the basic rate of single pension.



INVOICE




Mr Sammy Sample
55 Demo Street
ZUYTDORP WA 6536

Invoice No: 5,440
Date: 7/03/2013

PERIOD: 1/11/2008 to 30/11/2008	1 MONTH/S			
Previous Balance \$65.00				
DATE	DESCRIPTION	DEBITS	CREDITS	BALANCE
30/11/2008	Monthly Package Contribution Fee	\$267.00		\$332.00
	Shopping			\$332.00
	Cleaning			\$332.00
AMOUNT DUE:				\$332.00

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT

Name: Sammy Sample Invoice No.: 5,440
55 Demo Street ZUYTDORP WA 6536 Amount Due: \$332.00

	PAY ONLINE	Payments can be made direct to our account BSB: 012345 ACCT: 321654987 To ensure your payment is allocated to your account please use your reference 246
	PAY BY PHONE	Payments can be made using your Visa or Mastercard by calling our offices on 1800 008 498
	PAY BY CHEQUE	All cheques should be made payable to Alchemy Technology and posted to P.O Box 468 West Perth WA 6872

Budget Planner

Client Budget Planner

Select Client and Funding
 Client: 10 Client Becks
 Funding Source: 73 Home Care Level 4
 Date: 16/04/2015

Saved Budget Plans for selected Client and Funding Source

Income

Income Type	Amount	How often	Weekly	2-Weekly	30 Days	Fin.Year	Rem.Fin.Year
Budget Allocation	\$130.32	Every Day	\$912.24	\$1 824.48	\$3 909.60	\$47 566.80	\$9 904.32
Contribution	\$9.77	Every Day	\$68.39	\$136.78	\$293.10	\$3 566.05	\$742.52
Total Income:			\$980.63	\$1 961.26	\$4 202.70	\$51 132.85	\$10 646.84

Expenses

Item Type	Service Type	Amount	How often	Charge Type	Weekly	2-Weekly	30 Days	Fin.Year	Rem.Fin.Year
Administration		35.00 %			\$319.28	\$638.57	\$1 368.36	\$16 648.38	\$3 466.47
Service Types	Personal Care	0.50 Hrs	Weekly	SAT <6pm	\$37.50	\$75.00	\$150.00	\$1 800.00	\$407.14
Service Types	Personal Care	0.50 Hrs	Mon-Fri	WD>6PM	\$100.00	\$200.00	\$400.00	\$4 800.00	\$1 085.71
Service Types	Home Maintenance	2.00 Hrs	Monthly	SAT <6pm	\$30.00	\$60.00	\$120.00	\$1 440.00	\$325.71
Service Types	Personal Care	0.50 Hrs	Weekly	SUN <6pm	\$56.25	\$112.50	\$225.00	\$2 700.00	\$610.71
Service Types	Social Support	2.00 Hrs	Weekly	WD <6PM	\$50.00	\$100.00	\$200.00	\$2 400.00	\$542.86
Service Types	Centre Day Care	5.00 Hrs	Weekly	SAT >6pm	\$300.00	\$600.00	\$1 200.00	\$14 400.00	\$3 257.14
Total Expenses:					\$893.03	\$1 786.07	\$3 663.36	\$44 188.38	\$9 695.74

Proposed Budget Value: **\$87.60** **\$175.19** **\$539.34** **\$6 944.47** **\$951.10**

Planner Used to:

- Check current setting
- Plan New Settings
- What if I add a service?

After changes are made on the planning screen, they can easily be saved and applied

Regular Services for CDC

Recurring Services for Selected Client

Client: Aalus, Faith
Address: 1/47 Amisdale Rd
DUNCRAIG WA 6023
Telephone: 9255 8687

By Day of Week: Reverse Date Order Date Order

Datnext Time	Frequency Extent Of Service	Service Type & (Worked) Service Description
Sun 10/05/2015 9:00:00AM	Weekly 0.5 Hrs	S Wound Care (EN) (EAC
Sun 10/05/2015 3:00:00PM	Weekly 0.5 Hrs	S Wound Care (EN) (EAC
Sun 10/05/2015 5:30:00PM	Weekly 0.5 Hrs	S Wound Care (EN) (EAC
Mon 1/06/2015 9:00:00AM	Monthly 1.5 Hrs	C Lawns (Bobs Garden S
Mon 11/05/2015 9:30:00AM	Mon-Fri 1 Hrs	V Social Support (Brisban
Mon 11/05/2015 10:00:00AM	Mon-Fri 1 Hrs	V Social Support (Brisban
Mon 11/05/2015 10:00:00AM	Mon,Wed,Fri 1 Hrs	S Private Cleaning (Blank
Mon 11/05/2015 11:00:00AM	Weekly 4 Meals	S Delivery - MDW (Blank
Mon 11/05/2015 5:00:00PM	Mon-Fri 0.5 Hrs	S Wound Care (EN) (Alch
Wed 13/05/2015 9:30:00AM	2-Weeks 1 Hrs	S Shopping With Client (B
Wed 27/05/2015 11:00:00AM	DayOfMonth 1 Hrs	C Home Maintenance (Bo
Thu 14/05/2015 9:30:00AM	Weekly 1 Hrs	V Shopping (Brisbane, Ja
Thu 14/05/2015 10:00:00AM	DayOfMonth 2 Hrs	S Lawns (Lionheart, Rich

View Generated Services View Changes

Copy Recurring Service Bulk Suspend Recurring Service

Changing Recurring Service Details for (Aalus, Faith)

Service Details Comment Charges, Costs and Fees

Fee Charges / Co-Payments
Not for private Client
 Manual Fee Override
Fee Rate per Unit has become Contbn Rate below
Fee has become Total Contbn below

KM Travelled: 0.00 Total hours:

Vol Reimburse Rate: \$0.00 Rate Per Unit:

Mileage Payment: \$0.00 Client Contribution: ...

Labour Rate: Calculated Amnt: \$0.00

Labour Cost: \$0.00 Fixed Amount:

Material Cost: Material:

Out of Pocket Exp: Total Contbn: \$0.00

Total Cost: \$0.00 Amount Clnt Paid:

Organisation Contbn: \$0.00 Paid Date:

External Charges / Unit Costs
The amount charged (received) from another organisation or individual for providing the service. Includes purchases from funding bodies.

Charge Type: SUN>6PM

Charge Level
Charge Rate: Charge Manual Calculation
Fixed Charge:
Total Charge:

Direct Cost
Factor Type ID:
Pay Factor:
Direct Cost Rate: Direct Cost Manual Calculation
Direct Cost Fixed Amount:
Direct Cost:
Direct Cost On Costs:
Direct Cost Over Heads:

Remove Worker Meal Requirements

One-Off & Special Charge Services

Services For Selected Client(Aallus, Faith)

Display services with Funding
 All Program Fundings Select a Funding

Reverse Date Order Date Order By Service Type

Date	Time	Worker Name	Service Description / Service Type
Sat 9/05/2015	5:30:00PM	EACH D Nurse	/Wound Care (EN)
Sat 9/05/2015	1:00:00PM	External Staff Agency	/ Medication Management
Sat 9/05/2015	9:00:00AM	Tracy Blank	/Wound Care (EN)
Fri 8/05/2015	5:00:00PM	Minnie Alchemy V	/Wound Care (EN)
Fri 8/05/2015	2:00:00PM	Marie Knight	/ Cleaning
Fri 8/05/2015	10:00:00AM	Jane Brisbane	/ Social Support

Complete / Un-Complete Undelete Service Service Cancel

Copy Service Print Service Browse Logger Transactions

View Changes Link Case Notes Change Status Bulk Change

Status of Services: Cancelled Deleted Deleted (Batched) Service F

Changing Service Details

Service Details Service Comment Charges, Costs and Fees Other Details Other info Job Cost

Client Fees / Co-payments

Not for private clients

Manual Fee Calculation

Invoice Run Number: 0

Fee Rate Per Unit has become Contbn Rate below.

Fee has become Total Contbn below.

KM Travelled: 0.00 Total Hours: 0.50

Vol Reimburse Rate: \$0.00 Rate per Unit: \$0.00

Mileage Payment: \$0.00 Client Contribution: \$0.00

Labour Rate: \$0.00 Calculate Amt: \$0.00

Labour Cost: \$0.00 Fixed Amt: \$0.00

Material Cost: \$0.00 Material: \$0.00

Out of Pocket Exp: \$0.00 Total Contbn: \$0.00

Total Cost: \$0.00 Amnt Clint Paid: \$0.00

Organisation Contbn: Paid Date:

Fee Flags

Record Changed After Invoiced Service Capped

Review Completed

External Charges / Unit Costs

The amount charged (received) from another organisation or individual for providing the service. Includes purchases from funding bodies.

Charge Level Included in Batch Number: 0

Charge Type: 0

Charge Rate: \$0.00 Charge Manual Calculation

Fixed Charge: \$200.00

Total Charge: \$200.00 Release for calculation charges

Total charge less client contribution: \$200.00

Direct Cost Direct Cost Batch No.: 0

Manual Factor Allocation

Factor Type ID: 0

Pay Factor: 0.00 Direct Cost Manual Calculation

Direct Cost Rate: \$0.000000 Over Head: \$0.00

Direct Cost Fixed: \$0.00 Total Cost: \$0.00

Direct Cost: \$0.00 Total cost less client contribution: \$0.00

On Cost: \$0.00

Payroll Line Type:

Worker Pay Classification:

Accounting / Payroll Cost Centre:

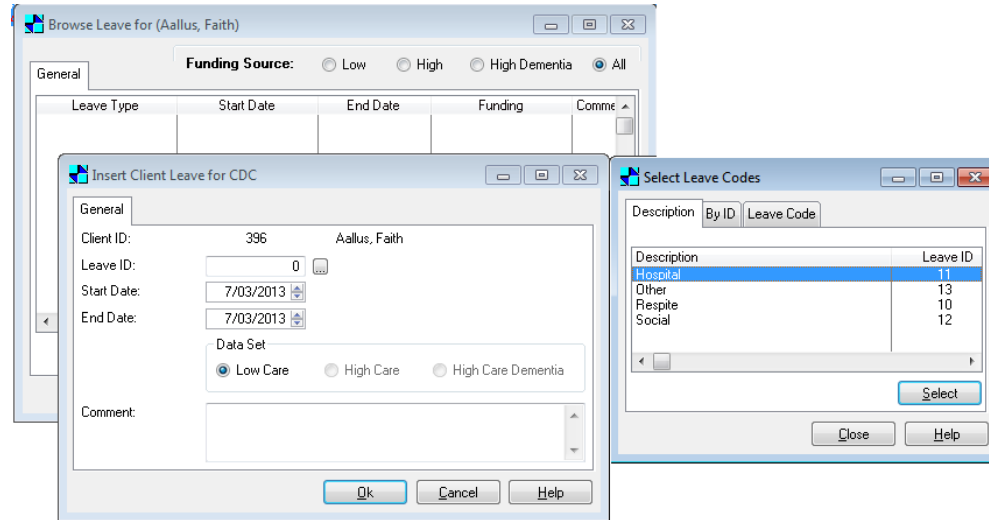
Payroll Income Type:

Worker Included In Payroll Export:

Service Type Included In Payroll Export:

Show SA Details (SA only) View Meal Requirements Remove Worker Ok Cancel Help

Leave Episodes



Leave Entitlements need to be considered for leave.
Adjustments are to be made to subsidy from dept. as well as contribution based on leave days and type as per the guidelines

Budget Calculation

**OPENING
BALANCE**

Carried Forward
from Last Budget
Period



**BUDGET
INCOME**

Daily Subsidy from
Dept.

Client Contribution
Daily Care Fee
PLUS Income Tested

Eligible Supplements
Dementia & Cognition
or Veterans etc.



**BUDGET
EXPENSES**

Administration
Charges

Services Provided



**BUDGET
BALANCE**

Will Carry Forward to
Next Budget Period

Budget Statements Examples

YOUR LOGO HERE

BUDGET STATEMENT

Mrs Faith Aallus
147 Arncliffe Rd
DUNCRAIG WA 6023

Date: 16/04/2015

PERIOD:	1/03/2015 to 31/03/2015	1 Month		
Previous Balance		\$12,062.68CR		
DATE	DESCRIPTION	DEBITS	CREDITS	BALANCE
	Cleaning (1 Hrs)	\$30.00		\$12,032.68
	Social Support (6 Hrs)	\$150.00		\$11,882.68
	Wound Care (EN) (4 Hrs)	\$185.00		\$11,697.68
	Medication Management (0.5 Each)	\$20.00		\$11,677.68
1/03/2015	Budget for Period (HCP4)		\$3,971.72	\$15,649.40
1/03/2015	ADJ for reduction for Hospital (10 days) (25%)	\$960.90		\$14,688.50
1/03/2015	Contingency Fund (10%)	\$334.12		\$14,354.38
8/03/2015	Income Tested Fee (\$2.10 per day) (14 Days)		\$29.40	\$14,383.78
8/03/2015	Client Contribution (\$9.70 per day) (14 Days)		\$135.80	\$14,519.58
22/03/2015	Income Tested Fee (\$2.10 per day) (14 Days)		\$29.40	\$14,548.98
22/03/2015	Client Contribution (\$9.70 per day) (14 Days)		\$135.80	\$14,684.78
31/03/2015	Administration Fee 25%	\$835.31		\$13,849.47
BUDGET BALANCE AS AT 31/03/2015		\$13,849.47CR		

Transaction Style

YOUR LOGO HERE

BUDGET STATEMENT

Mrs Faith Aallus
147 Arncliffe Rd
DUNCRAIG WA 6023

Date: 16/04/2015

PERIOD:	1/03/2015 to 31/03/2015	1 Month	
Previous Balance		\$12,062.68CR	
BUDGET INCOME			
Budget for Period (HCP4)		\$3,971.72	
Income Tested Fee (\$2.10 per day) (14 Days)		\$29.40	
Client Contribution (\$9.70 per day) (14 Days)		\$135.80	
Income Tested Fee (\$2.10 per day) (14 Days)		\$29.40	
Client Contribution (\$9.70 per day) (14 Days)		\$135.80	
TOTAL INCOME		\$4,302.12	
BUDGET EXPENDITURE			
Cleaning (1 Hrs)		\$30.00	
Social Support (6 Hrs)		\$150.00	
Wound Care (EN) (4 Hrs)		\$185.00	
Medication Management (0.5 Each)		\$20.00	
ADJ for reduction for Hospital (10 days) (25%)		\$960.90	
Contingency Fund (10%)		\$334.12	
Administration Fee 25%		\$835.31	
TOTAL EXPENDITURE		\$2,515.33	
BUDGET BALANCE AS AT 31/03/2015		\$13,849.47CR	

Category Style

Client Episodes of Care

Home Care Packages Claim & Reporting Module - Faith Aallus (396)

Episodes of Care

This screen displays all episodes of care for Faith Aallus
An episode of care is a period between the Commencement date and the Cessation Date.
A data set must be completed for each "Episode of care"

Commencement Date	ACAT Assessment Date	Cessation Date	Funding
1/08/2013	1/08/2013		HCP Level 4

Changing Client HCP Record (396)

General Details | Supplement Records | Cessation Details

Client ID: 396 Aallus, Faith

Package Type: Level 4

Commencement Date: 1/08/2013 ACAT Assessment Date: 1/08/2013
(will appear as the Commencement Date on the Monthly Claim form)

Care Recipient ID: 25161312 Residential Aged Care Facility care level
 High (nursing home) Low (hostel)

Service status prior to commencing HCP

Received CACP Did not receive Services
 Received EACH Other
 Received EACHD Unknown
 Received HACC or other community service

Special Needs Status

People from Aboriginal and Torres Strait Islander communities
 People from culturally and linguistically diverse backgrounds
 People who live in rural or remote areas
 People who are financially or socially disadvantaged
 Veteran
 People who are homeless or at risk of becoming homeless
 Care-Leavers (including Forgotten Australians, Former Child Migrants and Stolen Generations)
 Parents separated from their children by forced adoption or removal
 Lesbian, gay, bisexual, transgender and intersex people

Living Arrangement

Lives Alone Other
 Lives with Spouse, Family or Carer Unknown
 Lives with Others

Carer Status

Co-Resident carer(1) No co-resident carer(2) No carer(3)

Ok Cancel Help

- Commencement & Cessation Dates
- Supplement Records
- Codes and details as required for Reporting
- Data Validation is a MUST

Changing Client HCP Record (396)

General Details | Supplement Records | Cessation Details

Supplement Eligibility	Assess Form	Apply Date	Approval Date
Dementia & Cognition ARIA	PAS RUDAS	1/01/2015 1/03/2015	2/01/2015 1/03/2015

Insert Change Delete

Ok Cancel Help

General Tips on Making it Easier



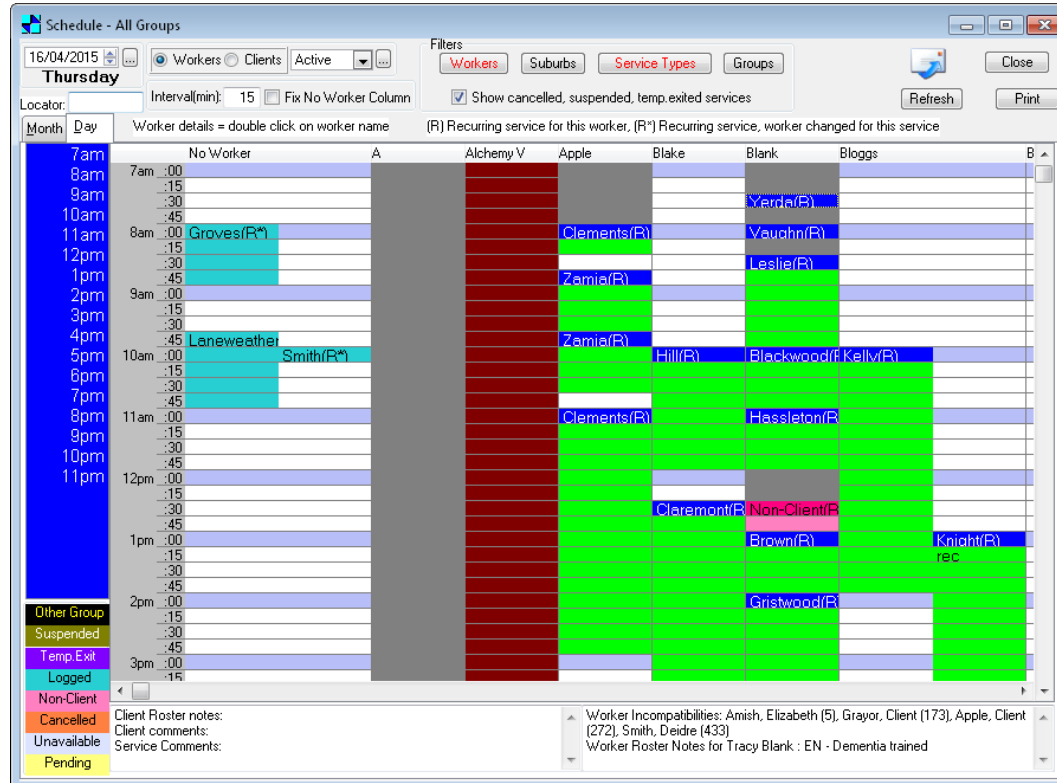
What technology can be used to make it easier to assist clients and providers to manage the budget?

MAKE TECHNOLOGY YOUR FRIEND

- **Rostering Systems**
 - Capacity to populate Budget based on Roster planning/actual
- **Client Access Portals**
 - Client/NOK access to roster planned
 - View Budget statement online
 - Submit roster changes/requests
- **Mobile Roster for Workers**
 - Enable live updates of services and service verification
 - More Accurate Charges and Reduce Timesheet Checks



Roster Schedule



View at a Glance:

- Availability
- Incompatibility
- Roster Notes
- Unallocated

Amend Rosters:

- Drag & Drop
- Amend Times
- Add Case Notes
- Fill Gaps
- Change Recurring

Worker & Client Rosters

WORKER ROSTER						
For Alanis Apple(5) for the period 20/04/2015 to 20/04/2015						
Date Time	Client	Service Type	Total	Funding	OHS/AWHIS Notes	
Mon 20/04/15	Mr Clements, Client	Client Check	0.50 Hrs	HACC		
8:00am-8:30am	2/28 Haig Street, PERTH					
	Mrs Belmont, Client	Personal Care - Low	0.50 Hrs	HCP2		
8:30am-9:00am	19 Cadorna Street,					
	Ms Grayor, Client					
9:00am-10:00am	41 Broadview Cross					
	Smith, Olga					
10:00am-11:00am	AARONS PASS	Makes bed as well				
	Mrs Amish, Elizabeth	Carrs Estate, Villa T				
1:00pm-4:00pm						
	Mr Smith, Client	55 Colin Street, PE				
2:00pm-3:30pm						

WORKER RECURRING ROSTER		Supervisor:							Roster Starting: 19/04/2015
Worker: ALCHEMY V. MINNIE									
Week 1									
Start Time	FinishTime	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
9:00AM	11:00AM			Personal Care					
10:00AM	10:00AM								
11:30AM	12:45PM								
2:00PM	4:00PM								
5:00PM	5:30PM								

CLIENT SCHEDULE		Roster Starting: 19/04/2015						
Client: AMMA, ANNA								
Prefs Gender: FEMALES		Case Manager: Green, Maureen						
Roster Notes: Client Roster Test								
Week 1								
Start Time	FinishTime	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
08:00AM	09:00AM		Tracy		Alanis		Alanis	
09:30AM	02:30PM					Alanis		
11:00AM	12:30PM			Alanis				
Week 2								
Start Time	FinishTime	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
08:00AM	09:00AM		Tracy		Alanis		Alanis	
09:30AM	02:30PM					Alanis		
11:00AM	12:30PM			Alanis				

Rosters for workers that highlight the Funding Type to ensure workers are aware of client type

Other Areas



Equipment

- Hired vs Purchase & recording
- Alerts when equipment is assigned at time of discharge

Mobile Worker Solutions

- Access & update timesheets
- Verification of Service Delivery
- Access to documentation



Linking to Mapping functions

- Pay accurate* travel costs based on client locations
- Calculate Travel within services (for possible charge to client budget)

IF ONLY I KNEW!

A few tips from sites that have implemented budgets;

- Develop a close relationship with Finance Department
- Have a preferred supplier listing for a variety of services with providers you have already vetted and checked, This will reduce further admin time if you can show clients you already have someone you deal with and 'recommend'
- Know your point of difference! It will make a big difference when negotiating with a client on who provides the service
- Know your costs/charge rates, and make sure they are sustainable



Government Reporting Our Guarantee

SMS enables organisations to record services from any source

If you have new funding and require specific reporting requirements,
SMS will be amended to cater for the funding

When reporting requirements change,
SMS will be amended to cater for the funding

Alchemy remains actively engaged in community care
through our sponsorship of industry bodies & participation in
conferences & seminars

QUERIES?



Please e-mail racheal@alchemytechnology.com.au