So you’re looking for technology for your homecare agency. A quick search online reveals many vendors…who appear to be offering the same features. Where do you start to figure out what homecare technology is right for your business?

A good place to start is with the questions in this report. If you ask each vendor these questions, you will quickly begin to see some significant differences in their offerings.

Here is a summary of questions to ask each vendor. Each question will be discussed in more detail below. At the end, we’ve included a handy checklist to speed up your research, with the questions about Generations already answered.

Ten Questions To Ask
1. Is your system the right size for my business now, and can it grow as my business does?
2. What methods of time tracking and caregiver accountability are supported?
3. How well do you understand the homecare industry?
4. What are the scheduling capabilities?
5. Does your software link to other programs for billing, payroll, and accounting?
6. What platforms are supported? Do you have apps?
7. What are tracking and management features available?
8. What type of training and support is available?
9. What type of contract is required?
10. Can you give me a guided demonstration via the Internet?

Question 1: Is your system the right size for my business now, and can it grow as my business does?
Most homecare software is designed to solve simple personnel and scheduling problems, and is just one step up from doing it yourself with Excel, Access, or white boards. Think about what you need to run your business efficiently. Will your staff likely remain the same? Will you only need to print schedules and enter basic information?

What if you have more complex considerations, such as dozens or hundreds of caregivers who turn over quickly? Perhaps you need to keep track of supervised visits, when TB tests are due, when certifications need to be renewed, what in-services caregivers have attended, who has been absent and when, and also stay in compliance with laws and regulations. Do you need many reports or the ability to create your own reports?

If your business and scheduling requirements are more complex, low-end software probably won’t do. You will need to look for a mid-range or enterprise solution. If the vendor only has one
10 Questions To Ask Before Implementing Homecare Technology

system, make sure it’s the right size for your organization. The right program will handle your number of employees, your need for data exchange, and any complex requirements your organization might have.

Your homecare software should be able to adapt easily to the various changes your business experiences. Even if you are just starting a homecare company, your business will grow and expand. Will the software support multiple users? If you open another office, can you use the software in multiple locations? Be sure you can secure the software by both user and location, and that you can filter reports based on different locations.

**Question 2: What methods of time tracking and caregiver accountability are supported?**

A robust homecare software system will offer several methods of time tracking. Most systems offer an internal method to create and edit timesheets and/or a telephony system, and some offer a mobile app with GPS capability.

Internal timesheet editing should be tied directly to the scheduling portion of the program. In a robust system you will be able to create timesheets based on the schedules, make changes and add notes to those timesheets, and have detailed reporting capabilities that can be exported for additional analysis if required.

Another method of tracking caregiver performance is electronic visit verification (EVV.) Also known as telephony, EVV typically interacts with your scheduling system to alert you when a caregiver is late; telephony also updates the schedules with accurate arrival and departure times of the caregiver. More sophisticated telephony may offer clock in and out via mobile app or GPS to confirm the caregiver is exactly where they say they are.

**Question 3: How well do you understand the homecare industry?**

A good vendor should understand the challenges you face in the industry. Ask how many other customers they have in your industry, or how many customers they have that face similar problems as your organization.

The vendor’s experience in the homecare industry can benefit you in several ways. For one, it saves you the trouble of educating them about how the industry works. For another, it means they can offer advice and best practices for solving common industry problems. A vendor with experience in the homecare industry can help you set up a good workflow for your key processes.
In essence, the right vendor for you becomes a trusted industry advisor and business partner. They help you weather the storms that the industry brings, grow as a business, and keep compliant for reviews and other state and national requirements.

**Question 4: What are the scheduling capabilities?**
Managing scheduling in an efficient and accurate way is crucial for the day-to-day operation of your homecare business. Therefore, the scheduling component of any software system should be capable of handling virtually anything you want to schedule.

Ensure that error-checking and business rules compliances are enforced in the scheduling process. Additionally, secure client ID protected texting capability can greatly increase communication with caregivers regarding open shifts or schedule changes throughout the business day.

Make sure that the vendor’s scheduling system provides a format that presents your schedule in a way that is easy to understand. Otherwise, your staff, clients, and employees will find the schedules difficult to understand.

**Question 5: Does your software work with other systems for billing, payroll, and accounting?**
Make sure the software you’re looking at has several options for exporting data to share with billing, payroll, and accounting systems. Stay away from closed systems that cannot interface or export to other software. If you’re using QuickBooks, make sure the vendor has passed the independent QuickBooks Technical Review. An interface that has been refined over many years will be far superior to one just placed in production.

**Question 6: What platforms are supported? Do you have apps?**
For increased flexibility, your best bet is probably a web-based program that supports apps. This gives you secure access to your data over the internet using a standard web browser or via many devices including iPhones and iPads. This type of program is indispensable for on-call staff, owners when traveling, and providing clients and caregivers with secure access to view their schedules online.

Find out if that program works cross platform, meaning on Windows, Macs, Chromebooks, and more. See what browsers the program supports; does it work with Internet Explorer, Mozilla Firefox, Google Chrome, and Apple Safari?
When exploring the app supported by the program, is it an immediate update to the program, or do you need to return to the office to sync the data? Is the app available on Google Play, iTunes, and Amazon?

Finally, when exploring the program itself in more detail, be sure that the program uses a database isolation mode so that your data is not mingled with the data of other agencies and thus increasing the risk of potential HIPAA violations.

**Question 7: What referral tracking and management features are available?**

In any business, referrals are important; this is especially true in such a people-related business as homecare. Be sure the software you choose supports referral tracking—preferably by client. You should be able to record and schedule communication with your referrals right in the program, as well as find your profitability based on referral sources. Another thing to look for is the capability to assign referral follow-ups to a specific person in your office.

**Question 8: What type of training and support is available?**

A software program is useless unless you really know how to best work with that program. Be sure that training and installation is included, and that there is ongoing training and support available after the initial installation period. Are there fees for support per hour or per incident, or is support unlimited?

If you can, look at the help system included with the program; does it include videos on key topics? Find out if there is a user’s group. The more training options the vendor offers the easier it will be for you to learn and utilize the application to its fullest potential.

**Question 9: What type of contract is required?**

While reading a contract is not the easiest thing to do, it is essential that you look at any contract before signing on the dotted line. What length is the contract? What is the termination policy? Does your agency own your data, or does the vendor?

Look closely at the method by which the vendor calculates the cost to your agency. The cost could be calculated per individual client, as a percentage of dollars billed to clients; it could be based on number of simultaneous office users, or on some other method. What does this mean in real dollars to your agency? Project out several years and include agency growth.
Looking at these things and perhaps sharing the contract with a lawyer, can save your agency money in the long run and definitely lead to peace of mind.

**Question 10: Can you give me a guided demonstration online?**

Because there are many products to choose from, reviewing homecare software can be time consuming. Some software can be reviewed online, and that's great if your needs are simple. Most homecare agencies, though, have demands that just cannot be met sufficiently by a self-guided review of the program. That's where a guided demonstration comes in. A guided demonstration offers you the chance to review the program one-on-one with the vendor and is scheduled at your convenience in your office. And unlike an interactive DVD or evaluation copy of a program, you can ask questions throughout the demonstration.

To prepare for the demonstration, make a list of things that you want to see, and how you want to see them. Tell the vendor what you are typically challenged with. Can the vendor show you step-by-step how to accomplish the goals you are looking for?

During the demonstration think about how the program will work for your business. Be sure it can solve whatever problems you throw at it. A successful demonstration allows you to clearly visualize how the program would work for your homecare business.

**The Vendor Checklist**

The following page provides a handy checklist to speed up your research, with the answers about Generations already filled in for you. Use this sheet to collect the answers from other vendors you're considering.

**About Generations Homecare System**

Generations is a leading provider of homecare software for more than twelve years. It manages your clients, caregivers, and scheduling, and also interfaces with QuickBooks seamlessly for billing and payroll. To find out more about how Generations can help you with your homecare software needs, contact us today.

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## Homecare Software Vendor Checklist

<table>
<thead>
<tr>
<th>Question</th>
<th>Vendor 1</th>
<th>Vendor 2</th>
<th>Generations</th>
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<tbody>
<tr>
<td>Is your system the right size for my business?</td>
<td></td>
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<td>Used by a wide variety of agencies from start-up to large organizations.</td>
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<tr>
<td>What methods of time tracking &amp; caregiver accountability are supported?</td>
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<td></td>
<td>Internal timesheets and integrated telephony with GPS capability.</td>
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<tr>
<td>How well do you understand the homecare industry?</td>
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<td></td>
<td>Designed specifically for non-medical &amp; Medicaid sectors of the homecare industry.</td>
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<tr>
<td>What are your scheduling capabilities?</td>
<td></td>
<td></td>
<td>Schedules are easy to add and adjust, plus have robust error checking.</td>
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<tr>
<td>Does your software work with other programs for billing, payroll, and accounting?</td>
<td></td>
<td></td>
<td>Interfaces with QuickBooks, Google Maps, and exports both billing &amp; payroll in several formats.</td>
</tr>
<tr>
<td>What platforms are supported? Are there apps?</td>
<td></td>
<td></td>
<td>100% web-based across multiple platforms. There are apps for office, caregivers, and clients.</td>
</tr>
<tr>
<td>What referral tracking &amp; management features are available?</td>
<td></td>
<td></td>
<td>Referrals are tracked by client as is correspondence with referral sources.</td>
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<tr>
<td>What type of training &amp; support is available?</td>
<td></td>
<td></td>
<td>Several training options including one-on-one</td>
</tr>
<tr>
<td>What type of contract is required?</td>
<td></td>
<td></td>
<td>No long term lock-in or early cancellation policy.</td>
</tr>
<tr>
<td>Can you give me a guided demonstration online?</td>
<td></td>
<td></td>
<td>Yes.</td>
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</tbody>
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