

The background of the cover is a dark blue-tinted image showing a person's hands typing on a laptop keyboard. Overlaid on this are faint, glowing white lines and data points, suggesting a digital or data-driven environment.

# Private Duty Software Buyer's Guide

**2020**

AlayaCare | Better Technology, Better Outcomes.  
[www.alayacare.com](http://www.alayacare.com)

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## INTRODUCTION.

Congratulations! Deciding to implement a new software solution is step one in realizing new levels of growth, efficiency and, yes, revenue for your agency. With an effective solution in place, you'll be able to expand your service lines, achieve operational efficiencies, leverage competitive differences, and reveal actionable insights from a wealth of valuable data.

Perhaps you're looking to upgrade your legacy software. Or perhaps you're finally shifting away from paper-based processes and embarking on a digital solution. Regardless of where your agency is currently situated, this guide is intended to help you tick all the relevant, important boxes when contemplating what you need out of a new software platform.



The background of the page is a photograph of an elderly couple. The woman on the left has short, curly grey hair and is smiling broadly while holding a tablet computer. The man on the right has short grey hair and is also smiling, holding a white mug. The entire image is overlaid with a semi-transparent dark blue filter. The text "Why is technology imperative to home care?" is centered in the lower half of the image in a large, white, bold, sans-serif font.

# Why is technology imperative to home care?

**Quite simply, technology is revolutionizing home care. Its benefits run so deep that agencies are wise to explore new opportunities now.**

For starters, modern tech creates efficient workflows – thus enabling all staff to invest maximum time in the most important aspects of your operations. For skilled caregivers, that means more time providing personalized care to clients and less time dealing with forms, reporting and scheduling. For back office staff, that means major gains in time previously spent in laborious areas like billing and referral processing, manual data entry, and more.

Making your agency tech-savvy means bringing timely access to important information for whoever needs it. Such visibility and access to data improves the function of schedulers, gives caregivers a window into a client's real-time status before they walk in the door, and offers new tools like remote patient monitoring and virtual visits as options to boost the flexibility of client care.

While switching software solutions is an upfront cost, efficiencies gained can quickly start to save time and money across the board. We've watched clients do just this, within the first year of implementation: one agency recaptured 60 percent of the time they had previously spent on payroll; another reported their PSWs had far greater satisfaction rates being able to access client information from the road; another saved \$40,000/year by dropping paper consumption by just 30 percent; another reports a greater ability to respond to clients quickly by adapting on the fly to their shifting needs and schedules.

While your agency can tap newfound gains from technology, it can also adapt and grow despite unsettled, challenging times. Flexible software is the foundation on which to sustain as well as grow operations. It has the ability not only to provide solutions to ongoing challenges, but in fact to predict those to come and ensure your agency is in a proactive position to manage those issues – such as seamlessly deploying virtual care options amidst a sudden pandemic.





## CHOOSING A SOFTWARE “PARTNER”

Choosing the right software of course is only part of the process. That’s because in order to make the most of it, you need a partner – rather than simply a vendor – to guide you along the way.

This concept is a vital up-front consideration for any agency. Partners embrace collaboration, innovation, communication, transparency, flexibility and true customer service to support agencies. They are invested in an agency’s growth, rather than being more or less tech support after their software is implemented.



# SOFTWARE PARTNERS VS. SOFTWARE VENDORS

Here are a few considerations:

**01**

## They actively try to make data work for you.

Look for software designed to uncover rich data insights, capture real-time VBP data, track performance management, align reporting needs, and incorporate operational and predictive analytics to influence personalized client care.

**02**

## They embrace other software.

Look for a partner whose interoperable system easily integrates third-party partners. This enables you to plug and play whatever features are necessary to support your administrative needs, client management and virtual care offerings, portals of communication for clients, and any topical problems such as infectious disease control.

**03**

## They are forward-looking.

Look for active R&D divisions, companies that take risks on innovation in order to meet industry demands that are only just emerging. One clue is that they have teams dedicated to ensuring their technology is prepared to handle any future needs in home care.

**04**

## They have a customer success plan.

Look for personalized customer support teams that, no matter your size, scope or complexity, can develop a customer success plan to govern data migration, implementation, and ongoing support.

**05**

## They listen to all your stakeholders.

Look for a technology partner that seeks out and responds to all priorities across your agency. Whether it's cost savings, greater productivity, streamlined implementation, back office reporting or ease-of-use for front-line staff, partners will ensure all voices are heard when designing a platform.

**06**

## They support diversification.

You may have an eye on complementary lines of business to introduce in a bid to scale operations. Look for a partner that can merge clinical and non-clinical data in one platform capable of delivering an across-the-board better experience for your interdisciplinary caregivers and clients.

**Your future awaits!**

We've broken this guide down into the key considerations any agency should review before signing the dotted line on a new software solution.

# Let's get started.



# SAAS SOLUTIONS.

Today, software across all industries taps cloud-based technology, as the flexibility and opportunities that arise far outstrip in-house servers. (Keep the servers, but they should primarily serve only as backup.)

What we are really getting at here is the ability for a Software-as-a-Service solution (SaaS) to make a huge difference in your agency's ability to balance growth with profitability.

Established legacy software vendors tend to be comfortable choices – but if they haven't modernized to embrace a cloud-based solution, they are behind the times.

In the cloud, the burden of servers, security and infrastructure falls on your technology partner, not you. As well, there is zero downtime, so if you need to install changes or release new features, your agency can conduct business-as-usual while updates take place out of sight. And cloud-based tech means all information is available and up-to-the-moment for anyone who has the clearance to access it, 24/7.



You can implement change in real-time, smooth out any wrinkles quickly, and start realizing new efficiencies fast.



Your teams can stay on task while your technology partner handles all issues related to security, updates and performance.



Saving immense time and money, it can be rolled out easily across multiple offices or regions, requiring no new hardware installations.



Your caregiving teams can access client care plans from anywhere, document their progress in real-time, and share information with any stakeholders in their circle of care.



You can gain greater control over day-to-day operations as you gain newfound freedom to review and finetune the process and implement changes any time, from anywhere.



In the SaaS space, companies are more guided by innovation than legacy software providers that tend to keep the status quo rather than invest in next-gen technology solutions.



It has a limitless capacity to grow as you grow.



# SCHEDULING

Scheduling has long been a pain point for agencies who seek to juggle the time-specific requirements of many clients with the needs – and skill sets – of their caregivers.

But there's no need for this process to be complicated or time consuming. The right software enables your schedulers to easily create efficient schedules and routes, determine the best care worker to perform visits, identify staffing efficiencies to meet growing demand, and ultimately, improve the continuity and quality of care you provide. And importantly: it must also be easy to use.

## Does the Software...

- ✓ Let the scheduler know caregiver availability in the same view as the employee finding window?
- ✓ Let the scheduler highlight individual caregiver-client continuity within the employee finder?
- ✓ Inform the scheduler how many hours the caregiver has worked this week and over the duration of payroll at the point of scheduling?
- ✓ Provide visibility into travel time (or distance) for each caregiver at the point of scheduling?
- ✓ Deliver an easy view of available caregivers so the scheduler can move a shift instead of trying to fit in the caregivers?
- ✓ Allow the visit to be moved so the preferred caregiver can make it?
- ✓ Give caregivers visibility into accepted shift offers, and request shifts that work for them?
- ✓ Ensure that any recurring shifts are slotted and don't need to be double-checked by the scheduler?



# MOBILE APPLICATION

With caregivers travelling between client visits, it's important to choose a software with robust mobile capabilities that can offer real-time access to schedules, route details, billing, risk assessments, time tracking, client data, form reporting, and more.

An efficient, intuitive app that can be accessed anywhere, anytime via smartphone or tablet helps deliver a seamless experience for caregivers and, as a result, clients. Meanwhile, EVV via smartphone GPS data can provide accurate time and attendance information, while folding an extra layer of security for these skilled staff members.

## Does the Software...

- ✓ Offer an offline mode so that caregivers can work fluidly in rural areas?
- ✓ Include an autosave mode, so that work is not lost in event of an emergency?
- ✓ Enable digital documentation to be completed and saved in draft form to finish later?
- ✓ Have customizable forms in the mobile app to build from scratch, if desired?
- ✓ Build an individualized care plan into the forms?
- ✓ Promise a reliable app free from glitches?
- ✓ Let caregivers see what their colleagues write, such as progress notes?





# BACK OFFICE ADMINISTRATION

Any agency's foundation is the back office. Strong software must enable workers of all stripes to submit, organize and update client and organizational information in the system as efficiently as possible.

In this industry, too much time has been lost by entering data, processing referrals, completing timesheets, reporting on compliance, and recording other key metrics. Ensure your new software is built specifically to streamline all administrative tasks – and ideally, have flexible functionality based on who is using it.

## Does the Software...

- ✓ Assign roles and permissions so you can give varying levels of access to employees and stakeholders?
- ✓ Allow employees to log on and manage their own availabilities and unavailabilities – and even self-schedule?
- ✓ Are the fields customizable (such as how this employee found their employment with you)?
- ✓ Make it easy to assign tasks to caregivers? Over a mobile app?
- ✓ Track hours in real-time so late shifts are flagged as they happen?
- ✓ Enable digital, modifiable care plans?
- ✓ Allow and remind caregivers to customize their skills and ongoing qualifications?
- ✓ Include customizable fields (e.g. referral source)?
- ✓ Simplify the process of uploading and storing documents in a client's profile – even if using a mobile phone or tablet?
- ✓ Track 'footprints' to see the history of change to forms and fields?
- ✓ Have levels of transparency so caregivers can read comments from their colleagues in real time (e.g. progress notes)?



# BILLING & PAYROLL

Software should make all billing practices far more efficient by slashing manual input in favor of digital solutions that adhere to protocols set by regulators.

Your technology partner should be able to highlight how their platform processes claims with speed, how the system itself yields a shorter turnaround time from payer back to agency. It should, like all elements in this guide, be customizable so that varying levels of pay rate among caregivers is adeptly handled, as well as shifting rates for peak and off hours if necessary.



## Does the Software...

- ✓ Integrate directly with your accounting software?
- ✓ Offer flat file integration (a CSV or Excel export) or does data flow automatically?
- ✓ Integrate into a desktop-based or online accounting software, or both?
- ✓ Have split-billing capabilities?
- ✓ Have long-term care billing capabilities?
- ✓ Include customizable bill rates and pay codes?
- ✓ Automatically check client eligibility so that claims do not risk rejection?
- ✓ Offer one-click upload to clearinghouses?
- ✓ Automatically search for potential errors before submission?



# CLINICAL

Ensuring seamless access to a client's care plan for all key stakeholders is crucial. Fully integrated clinical documentation solutions allow all client data to reside in one platform so that interdisciplinary teams can make relevant, timely care plan updates, flag the need for interventions, and set goals in real time.

If you've remained largely paper-based to date, the right software can open up a whole new world that eliminates unnecessary data entry and facilitates efficient workflows and form submissions.

## Does the Software...

- ✓ Enable the care plan to interact with forms?
- ✓ Let you customize those forms?
- ✓ Ensure the forms have logic and business rules built in (e.g. if the answer to a question is an 8 out of 10, three new questions appear)?
- ✓ Let you construct the care plan with outcome goals that tie into each visit?
- ✓ Have medication management capabilities?
- ✓ Offer a secure HIPAA compliant environment?





# REPORTING & INSIGHTS

The power of data exploration is evident across all industries, and health care ranks among the leaders. For home care agencies, data mining and measurement can yield a deep array of reporting possibilities.

It is integral to have the capacity to unearth, filter and export reams of data into powerful reports that you can use to identify key trends, flag important issues, and predict cost-savings, staffing needs, and all important elements of your day to day operations. A technology partner must be able to support your efforts to effectively collect, store and manage growing volumes of health data – because analyzing it through specialized reports correlates to better business decisions, and ultimately better client care.

## Does the Software...

- ✓ Include a built-in Business Intelligence (BI) tool?<sup>1</sup>
- ✓ Enable you to report on virtually any dataset against any other dataset?
- ✓ Give you full access to your own data, free of additional fees?<sup>2</sup>
- ✓ Allow you to run reports of any kind, free of additional fees?
- ✓ Enable you to create customized, niche reports, such as service hours by zip code, filtered by caregiver?
- ✓ Generate visualization tools? (E.g. supply/demand heat maps; measuring services by code, month by month, by geography?)
- ✓ Build reports on straightforward topics such as client feedback, skills and competencies, shift offers (reasons declined) and scheduler utilization?

1. A BI tool is extremely valuable, a table allowing you to report on any particular set of information against anything else – giving maximum creativity in assessing how your agency is doing. Without BI, platforms produce “canned” reports in pre-built templates – which most agencies will outgrow. It’s best practice to ask what BI tool is involved, and if it’s a third-party vendor that specializes in BI, all the better.

2. Be mindful that not all software allows data access without a charge. You should be able to access your own data to run any report you want, without incurring more fees. (End-arounds can include data being extracted in PDF format, necessitating you to hire someone to convert the data to Excel and then run reports, which are at that point days or weeks old.)

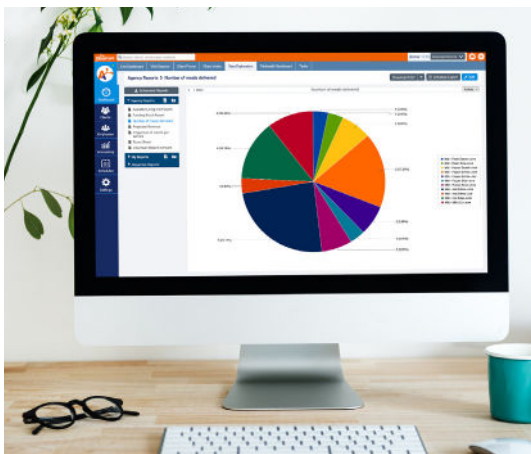


# ROADMAP

Forward-thinking technology partners need to ensure they have a roadmap in place to guide them forward in terms of their short and long-term goals. This means they are firmly focused on their clients' emerging needs, and have a plan to roll out software updates and strategic technology initiatives. If a vendor has no roadmap at all, that would be a bright red flag.

## Does the Software...

- ✓ Have a roadmap, indicating the technology partner is aiming to adapt to coming trends?
- ✓ Quantitatively help you understand and analyze what is now on the roadmap?
- ✓ Help you analyze what has been successfully developed over the past two years?
- ✓ Help determine how much money is and should be dedicated to the roadmap items (both in dollars and as a percentage of the company's revenue)?





# CUSTOMER SERVICE

In the field of software development, it's vital that any partner you choose be highly responsive when it comes to customer service. It is worth the time to investigate this aspect of a tech company, do the due diligence necessary, as it can range dramatically and impact your agency considerably.

In your research, don't put too much stock in third-party review sites as they can be rich with incentivized reviews. Scan for themes that crop up, and if those themes lean toward negative, you may be on to something.

## Does the Company...

- ✓ Have local operations? Scan their LinkedIn page and other materials, as if support people are overseas (as is often the case), time zones may be a challenge and your customer support won't be as seamless as you'd hope.
- ✓ Have a customer success team that can build you a custom plan to straddles data migration to implementation to ongoing support?
- ✓ Have sufficient numbers of customer service reps, so you aren't waiting weeks for a response?<sup>1</sup>
- ✓ Have a multi-level support system? E.g. **Level 1:** basic tech support for routine questions; **Level 2:** a call center or dedicated customer success rep; **Level 3:** emergency support that corrects any system failures.
- ✓ Lag in response when you are communicating with their sales teams?<sup>2</sup>

1. Note: we've seen client-customer service rep ratios as high as 40:1 – at that rate even simple inquiries will take far too long to be addressed.

2. This may reflect company culture – and such delayed response can be expected of customer service down the road.





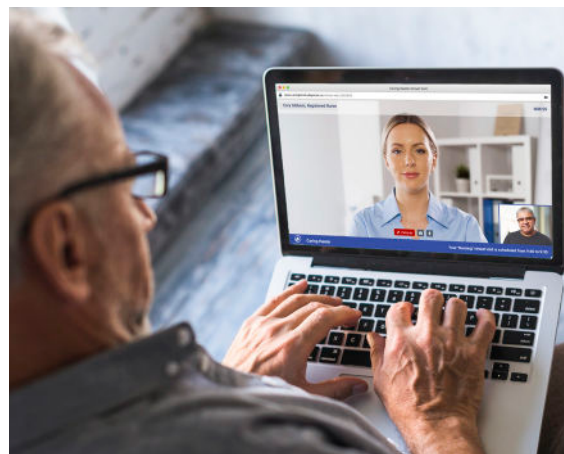
# INNOVATION

Our industry is changing rapidly and any notion that a software solution that's not invested in – or capable of – evolving and adapting to shifting needs is simply not in-line with the realities of what the future may hold. The benefits of machine learning and artificial intelligence (AI) when it comes to the use of data, for example, should be on offer by your software provider.

As we are seeing throughout health-care, they have exponential benefits for client care, including keeping clients safe at home, preventing medication errors, monitoring their health status from afar, and reducing trips or even admissions to hospital. Innovation means maximum flexibility for however the future of home care plays out.

## Does the Company...

- ✓ Have in place a plan for their tech's next generation?
- ✓ Invest in smart scheduling systems, or predictive technology for negative health events?
- ✓ Employ data scientists, specifically?
- ✓ Have an R&D department?





# PRICING

Of course, price considerations are hugely important for any agency looking to onboard a new software solution. Yet there are important nuances to consider when it comes to determining the true value of the product – and the support you receive with it.

## Does the Company...



### Charge set up, or professional service fees?

This upfront cost covers set up and training. In some cases, it can be a week's worth of time; for very large, enterprise customers, it can be a year-long implementation.

A typical timeline is a 90-day implementation, and most software companies bill between \$100 and \$150 per hour for their time (a typical project is 10-40 hours of implementation). Some companies quote as a measure of the monthly recurring revenue (MRR). A common quote would be 3 months of MRR for an implementation.



### Offer ongoing training?

Some companies have a clean, streamlined onboarding that is inexpensive, but can also be very hands-off. Be sure to examine line items to see the level of training being offered.



### Charge recurring fees?

SaaS companies generally do not advertise prices on their website as most clients have nuances that can influence the price.

Most companies quote on a per active client basis, and in the non-medical space the average price would be in the \$10 per client per month range, and about \$12 per client for skilled private duty nursing. Medicaid and Medicare billing adds enough complexity to add about \$1 per client per month to each scenario.



### Are there hidden fees?

Be very clear to analyze the contract for hidden fees. The most common charges outside of the main contract are for: EVV (typically about \$0.10 for every clock in and out); SMS messaging (a few dollars per user per month for, say, 1,500 messages); mobile apps being billed separately.



# APIs

Application Program Interfaces (APIs) increase your agency's interoperability and ultimately its ability to grow. Any software you choose must have the flexibility to adjust to your needs both today and well into the future.

A big part of that is ensuring the tech includes robust APIs that allow for the quick access and exchange of accurate data. It is a definite point of discussion with any possible technology partner.

## Does the Company...

- ✓ Have a list of third-party vendors that have built integrations?
- ✓ Give you an understanding of what subscription level is required of those third-parties for the integration to work? (E.g. if the integration is with HubSpot or Salesforce, is an enterprise level account required with HubSpot or Salesforce?)
- ✓ Have other clients who have built custom additions through their own third-party developers?
- ✓ Allow you to accomplish workarounds with middleware? (E.g. can you integrate a Google sheet, which a software like Zapier can pull data from for greatest efficiency?)
- ✓ Provide you with a technical advisor? Many solutions do not have real APIs, which means that building your own integrations can be messy and tedious.





# THE COMPANY

As we laid out in the intro, it's vital to find a technology partner, not simply a vendor. Apart from researching each company online, as we touched on in the customer service section, it's prudent to inquire into the operations of the software provider.

It should quickly become apparent if they are a good match for you based on what information you can unearth, as well as the answers they can provide to certain questions. It's important to know their strengths and areas of focus.

## Has the Software Company...

- ✓ Been around for enough years to establish credibility?
- ✓ Successfully raised capital and continued to grow?
- ✓ Maintained growth mode or are they in "cash cow" mode?
- ✓ Produced specific innovations in their software within the past two years?
- ✓ Maintained a strong staff and an enjoyable workplace?<sup>1</sup>
- ✓ Been the subject of consistent negative themes in reviews on websites such as Glassdoor?
- ✓ Described their corporate mission and objectives? Do you know if they are primarily private duty, or do they serve other disciplines such as Medicare, hospice and skilled nursing facilities?
- ✓ Been overly dependent on key employees over the years, or do they maintain a balanced, deep bench of talent?

1. Doing so translates into you receiving continuity from their team, meaning customer success managers will be with you for a longer time, and will better understand your unique needs. One clue: ask if they have a net promoter score (NPS) among their employees?

# NEXT STEPS.

Just as important as selecting the right technology partner is ensuring the software is seamlessly implemented – and that means securing buy-in through all your agency's teams.

After all, installing technology that caregivers find cumbersome or that's not intuitive for back office staff would defeat the entire purpose of upgrading software in the first place.

While your technology provider can help walk you through best practices for successful implementation, there are a few key questions to consider before the roll-out begins:



## Assess the appetite for something new:

- ✓ Are your staff ready and empowered to utilize new technology?
- ✓ Are resources in place to perform a major software implementation?
- ✓ Do you have the bandwidth for change management?

## Understand where you're at and what you need:

- ✓ What is your current technical infrastructure?
- ✓ What specific new functions do you require?
- ✓ What clinical decision support and reporting capabilities are you looking for?
- ✓ Must a new solution comply with specific federal and local regulations?

## Identify goals:

- ✓ Do you have a set of defined business goals and needs?
- ✓ **We recommend following the SMART process:** Specific, Measurable, Attainable, Relevant and Time-Bound. These will help ensure focused and effective decision-making.

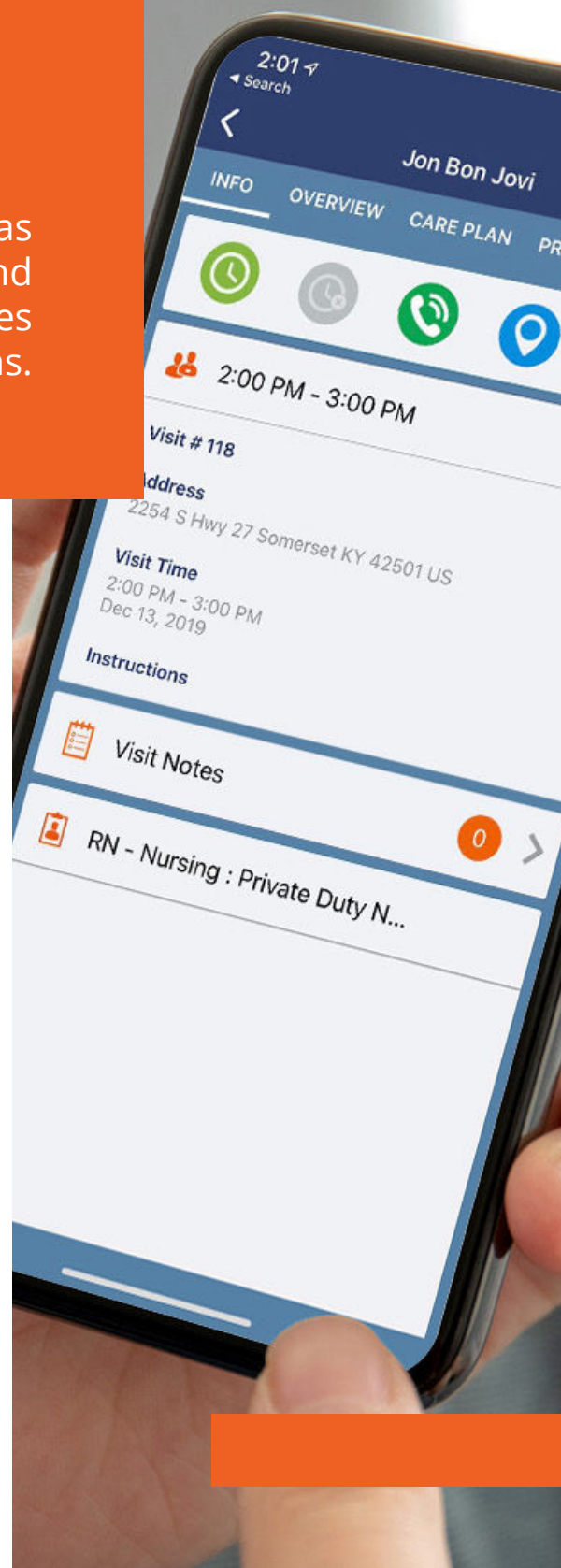
## Don't assume that technology will adapt to your current workflows.

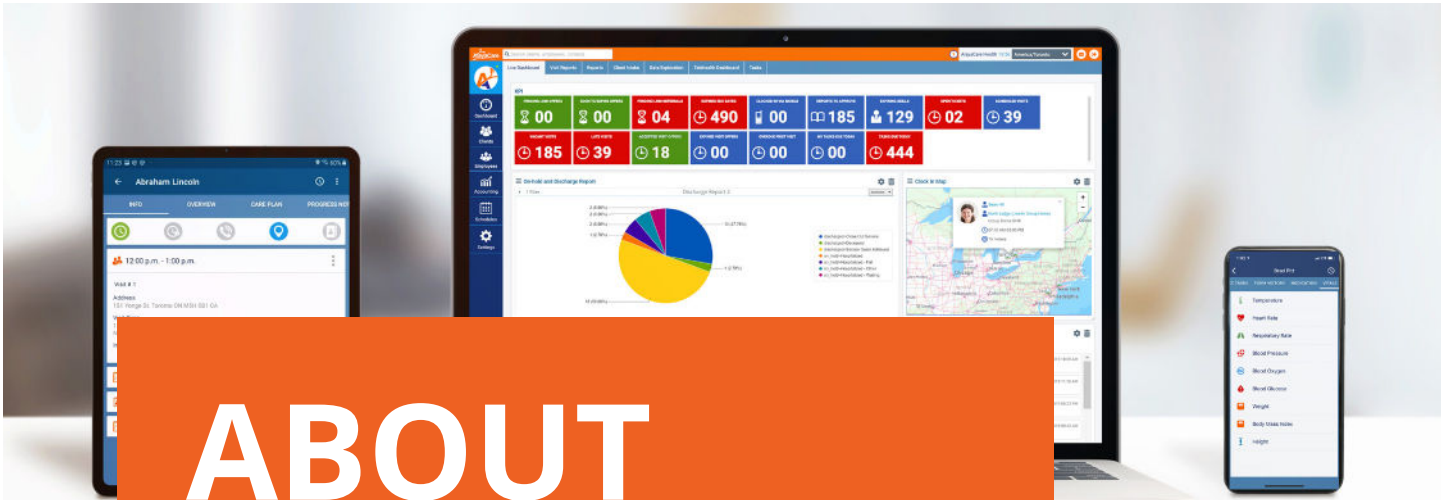
Instead, it should be viewed as an opportunity to revisit and optimize your business processes using today's innovations.

With these questions answered, you're well positioned to design a collaborative plan. The key word here is collaborative: it's important to involve your entire team in clearly defining required changes in work tasks and processes. This will help you set priorities, and also ensure everyone is on board with adopting – and using – something new.

This guide serves as a manual of what to consider with new software, as well as a compass you can use to move forward. It's time to differentiate your agency with innovations like Business Intelligence tools, Revenue Cycle Management capabilities, cloud-based SaaS systems, artificial intelligence and predictive analytics, remote client care, and new portals of communication. This is the infrastructure of the future, but it exists today.

**We are happy to help answer any questions, or learn from your experiences as well. Get in touch any time.**





# ABOUT ALAYACARE.

AlayaCare is a leading global home care software partner. Loved by over 500+ happy customers, discover a software built to help home and community care providers improve outcomes.

## Features & Benefits of Our End-to-End Solution:

- ✓ Benefit from Advanced Technology
- ✓ Enhance Compliance
- ✓ Optimize Operations & Increase Margins
- ✓ Provide Better Care
- ✓ Remain Value, Quality and Outcome Focused
- ✓ Deliver Client Centric Experiences

**1 Billion+**

Scheduled Visits Across our Platforms

**40 Million+**

Completed Forms Across our Platforms

**\$2 Million+**

Invested in AlayaLabs (R&D)

**400+**

Employees Worldwide

**GET IN TOUCH**

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<http://www.alayacare.com>



# APPENDIX.

## Questions to Ask During a Reference Call

### Success Criteria & Selection

- ✓ How long have you been using the system?
- ✓ Why did you implement home care software in the first place?
- ✓ Why did you choose vendor X?
- ✓ What are the results so far?
- ✓ Were you the decision maker responsible for selecting the solution?

### Implementation & Ramp-up

- ✓ Who helped you implement the system?
- ✓ How long did it take you to implement from start to finish?
- ✓ Was your implementation on time and within budget?
- ✓ How long did it take to learn the system?
- ✓ How do your users describe the ease of use?
- ✓ How easy is it to customize and make changes to the system?
- ✓ How has customer support been since your implementation?
- ✓ How much support from the vendor is needed?
- ✓ How would you rate the overall quality of the service?
- ✓ How flexible was the vendor in its process to meet your needs?

