

# Ten Questions to Ask Before Committing To Home Care Software

A Generations white paper



So you're looking for software for your home care agency. A quick search online reveals many vendors...who appear to be offering the same features. Where do you start to figure out what home care software 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: summary

1. Is your system the right size for my business?
2. Can your system grow as my business grows?
3. What methods of time tracking are supported?
4. How well do you understand the home care industry?
5. What are the scheduling capabilities?
6. Does your software link to other programs for billing, payroll, and accounting?
7. Is your software web-based, windows-based, or hybrid? What's the difference?
8. What are tracking and management features available?
9. What type of training is available?
10. Can you give me a guided demonstration via the Internet?

## Question 1: Is your system the right size for my business?

Most home care 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? Then a low-end system might suffice for you.

But what if you have more complex considerations, such as dozens or hundreds of employees 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 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 it might have.

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## **Question 2: Can your system grow as my business grows?**

Every business changes over time. Your home care software should be able to adapt easily to the various changes your business experiences. Even if you are just starting a home care 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 3: What methods of time tracking are supported?**

A robust home care software system will offer several methods of time tracking. Most systems offer an internal method to create and edit timesheets, and some vendors offer a telephony system.

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.

When considering telephony, be sure the systems you investigate give you the choice of using more than one telephony vendor. Ensure that the telephony method used is a “true” telephony system based on caller ID, and that it will alert you when a caregiver is late or there are “no shows.”

## **Question 4: How well do you understand the home care 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 home care 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 home care industry can help you set up a good workflow for your key processes, since they’ve already done that for other clients in the industry.

## **Question 5: What are the scheduling capabilities?**

Managing scheduling in an efficient and accurate way is crucial for the day-to-day operation of your home care 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. It is equally important to be able to email schedules directly from the program as well as obtain printed calendars for clients and caregivers.

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.

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## **Question 6: Does your software link to other systems for billing, payroll, and accounting?**

You should avoid closed systems that cannot interface with other software. Ask the vendor what links they have already built to other systems like QuickBooks, payroll processing, and caregiver mapping. How long has the vendor interfaced with this particular product? 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 7: Is your software web-based or windows-based? What's the difference?**

There are three main ways to have home care software work—Windows-based, web-based, or hybrid applications which can be a combination of both.

Windows based programs, including smart client applications, require you to install software on each computer. The advantages of Windows-based applications are performance, and tighter integration with other Windows-applications like Outlook. The disadvantage of Windows applications is they require installation of software on each computer.

With a web-based program, you access your data over the internet from any web-browser on any computer. While very convenient, performance may slow and there's no guarantee that your data is 100% secure. Since your vendor has control over your data, make sure they have a written guarantee you will get your data if you terminate your contract with them.

Hybrid applications like Generations®, offer a best of both worlds combination. While at the office, you use a Windows-based application for maximum performance and productivity. Away from the office you have the ability to access critical parts of your database over a web browser. Additionally, clients and caregivers can be given logins to view their schedules which makes everybody's life easier.

## **Question 8: 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 home care. 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 9: What type of training 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 with the purchase or lease price of the software, and that there is ongoing training available after the initial installation period. If you can, look at the help system included with the program. Find out if there is a users group or if regular trainings are offered to users. The more training options the vendor offers the easier it will be for you to learn and utilize the application to its fullest potential.

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## Question 10: Can you give me a guided demonstration over the web?

Because there are many products to choose from, reviewing home care software can be time consuming. Some software can be reviewed online, and that's great if your needs are simple. Most home care 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 home care 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—and remember to always check references before making a decision.

## About Generations Home Care Systems

Generations is a leading provider of home care software. The program 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 home care software needs, contact us today.

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## Home Care Software Vendor Checklist

Question	Vendor 1	Vendor 2	Generations
1. Is your system the right size for my business?			Generations is used by a wide variety of businesses, from start-ups to large organizations.
2. Can this system grow as my business grows?			Yes, there is no limit to the amount of information you can store in Generations or the number of users accessing the program.
3. What methods of time tracking are supported?			Generations has internal timesheets, interfaces with QuickBooks, and works with two telephony vendors.
4. How well do you understand the home care industry?			Generations is designed specifically for the home care industry. It is our only product.
5. What are the scheduling capabilities?			Schedules are easy to add and adjust and also have robust error checking.
6. Does your software link to other programs for billing and payroll?			Generations interfaces with QuickBooks, MapPoint, and a variety of payroll companies.
7. Is your software web-based, windows-based, or hybrid? Can clients and caregivers view their schedules on-line?			Generations is a hybrid application designed to offer the best security, performance, and integration. Office staff, as well as clients and caregivers, can securely access schedules on-line using a standard web browser.
8. What referral tracking and management features are available?			Referrals are tracked by client, as is correspondence with referral sources.
9. What type of training is available?			We have several training options including individualized training for and ongoing webinars.
10. Can you give me a guided demonstration over the web?			YES.