

Program Features and Functionality

Client Care Record (CCR) and SmartPayroll

Compare software – program name: _____

Software features in CCR – SmartPayroll	Y/N	Comments
General requirements		
Software installation & setup		
MS Access database – required Access 2007 /2010		
MS Access table setup – optional		
MS SQL server setup - optional		
Import facility to download basic client / employee / volunteer / supporter information		
Import facility to download NDIS price list		
Database setup options		
Unlimited company / cost centre setup		
Unlimited HADS projects		
Upload to HACC / CSDTA Mds recording		
National Disability Insurance Scheme (NDIS) setup and National Disability Insurance Agency (NDIA) portal link		
Linked to SmartPayroll <ol style="list-style-type: none"> 1. Standalone payroll system 2. Produce payroll data to upload to other payroll syst. 		
Database update options - Maintenance		
Automatic check for Program Update		
Automatic download of program update and re-linking to existing Network directory or SQL server		
Database Access setup – Security options		
1 Database access password		
2 Employee access password Access lever 1 – 3 plus access rights for selected users		
3 Administrator password setup to change database access		
4 Department /Cost Centre password setup		
Database Web access – username/password		
1 Administrator logon - access Client list with roster info		
2 Client logon – access Client roster data only		
3 External Service logon – access Client list with roster info		
4 Employee/Volunteer logon – access roster data		
New Client registration		
Clients log-on and book services /access service history. Update basic client details (Address / Phone numbers etc.)		
External service providers are able to manage their clients online by booking services (with brokerage numbers) Update basic client details (Address / Phone numbers etc.)		
Employee/Volunteer log-on and pick-up shifts , confirm shifts, submit time sheets , lookup service history		
Database Mobile access – username/password		
1 Client logon – access Client data only		
2 Employee/Volunteer logon – access roster data		
3 Use Company Code to identify SQL database		
Clients log-on and book services /access service history. Update basic client details		
Employee/Volunteer log-on and pick-up shifts , confirm shifts, Submit time sheets , lookup service history		

Software features in CCR – SmartPayroll	Y/N	Comments
Client Care Record (CCR)		
Client Record		
General setup information		
Client personal details incl. picture		
Service Type setup for detailed reporting & data analysis Eg. Aged, Mental – Intellectual disabled, Autism, Disability etc.		
GPS location finder to check address / import travel distance/time		
Local Government Area setup		
End of Service management		
Email facility: send and store emails incl attachments on client file		
SMS facility: send and store SMS's on client file		
Send Email and SMS to selected clients – mass mail-out option		
VIP's – record Relatives / Friends / General contact		
Manage First Contact / Invoice and Mail Recipient for Client		
Email / SMS facility for VIP's		
Complaints and Suggestions		
Record Complaints and Suggestions for Clients/Relatives/Staff		
Monitor and Analyse processes - record decisions and action taken		
Client External Services		
Record Clients' External Services – eg. Podiatrist, cleaning service		
In the Event of Death instruction		
Record details and instruction in the event of client's death		
Mail Merge facility		
Create Category for mail merge links – sort folder names		
Save document LINK on database		
Link documents on your network to the database for mail-merge		
Open documents (any file format) and mail-merge with client record		
Save mail merge document in Client file – option of saving mail merge documents in client file		
Print Clients' birthday lists and merge file (birthday letter)		
Save and open Web Links – sort links into categories		
Document links to Client file		
Save relevant documents (any file format) and rename docs to include Client ID - (docs are easily identifiable)		
Access/Open all Clients docs via the database		
Scanned Documents links to Client file		
Save relevant scanned documents (picture formats) and rename docs to include Client ID - (docs are easily identifiable)		
Access/Open all Clients scanned docs via the database		
Client Care Information		
Record Client Profile		
Detailed risk assessment – Likelihood and risk level recording		
<u>Record</u> : General client's risk management, Life Skills, Hygiene, Toileting, Mobility, Medical Info, Emotional - Physical – Aggressive Behaviour, Unsafe Action and Hazard warnings		
Medical History		
Medical summary information		
Client Admission record		
Client Admission Assessment record		
Client's Doctors		
Record Client's medical practitioners (GP, Dentist, Orthopaedic etc.)		
Create medical practitioners database for easy import		

Software features in CCR	Y/N	Comments
Client Record		Cont.
Client's Accident / Incident reporting		
Reports for Accident / Incident / Medical incident		
Record person who lodged the report		
Monitor action taken and analyse OHS issues		
Client Care Plan		
Care plan categories under the ACFI user guide (12 categories)		
Detailed appraisal questions for each care category		
List of approx. 400 appraisal question per client		
Care plan Library for easy care plan writing		
Monitor care plan assessment – assessment due dates		
Client Ongoing Care Notes		
Enter Client Care Plan notes – records can not be deleted		
Client Care Notes Library is attached.		
Date/Time stamp and report writer are recorded		
Client Notes		
Date stamp and record report writer		
Notepad to record client notes – can be changed and last changes are recorded with Date stamp and report writer		
Access quick note reference via calendar – eg. Last week notes ect.		
Home Risk Assessments for Client / Staff -- Likelihood		
Detailed risk assessment – Likelihood and risk level recording		
Record: Access and Outdoor Area, Home Entrance, Lounge, Dining, Kitchen, Bath, Bedrooms, Study, Laundry, Garage, Cleaning Equipment, Infestations and Hazards, Client Mobility assessment, other risks		
Risk assessment summary with scores for Client / Staff and Likelihood of occurrence		
Financial Support Services – manage financial assistance		
Record financial support provided – scaled by support type		
Calendar based reports with support totals		

Software features in CCR	Y/N	Comments
Client Care Roster - linked to payroll		
Care Worker setup		
Link Care Worker to client – list Client specific Care Workers		
Care Worker can be: Employee – Volunteer – Contractor		
Search for Gender preference : both – Female – Male		
Search for Care Workers closest to the client – Suburb search		
Pay Employee via Task manager – Hourly rate set in task manager		
Reimburse Volunteer – pay fixed rate / hourly rate + Allowance		
Pay rate can be varied between <u>tasks</u> setup and <u>hourly rate in payroll</u>		
Client Service Information		
Select Invoice Cycle – Monthly, Fortnightly , Weekly		
Select Invoice Recipient: Client , Carer, External Service		
Unlimited Brokerage number service setup for External Services		
Setup GST and Invoice Comments		
Send Invoice to Client / Carer / External service		
Deduct fees from pre-payment amount or invoice fees		
Monitor multiple fund setups for services		
Fund Management database will produce financial statements		
Task manager setup – list fees for various tasks		
Enter Employee / Volunteer pay/reimbursements (hourly rate or fixed)		
Enter Client Rates – Mon-Fri / Saturday / Sunday / Public Holiday		
Enter Contractor Rates – Mon-Fri / Saturday / Sunday / Public Holiday		
Setup Government subsidy in task setup – HACC and NDIS		
Fee option: Charge actual cost plus profit margin		
Public Holiday Calendar		
Public holiday date will be detected and pay rates / fees adjusted		
Roster data entries		
Enter Service date - Time - Care Worker or Contractor - Service Task		
1 Optional: External Service Provider / Brokerage Number		
2 Optional: Client Fund Management – prepaid service fees/ Gov.Subsidy		
3 Optional: Client direct invoice		
Any combination of service fees setting can be entered via <u>default setting</u> OR at the point of roster entry. Eg. An invoices can be separately issued for		
1 External service provider		
2 Deducted from prepaid funds		
2 Client private service request		
Manage service orders received from different sources		
Template option to save Roster data per fortnight		
Template Rosters setup is linked to calendar and can be entered for up to 10 week per template run –enter again to process another 10 weeks		
Roster Template can be enter for one client or ALL clients at the same time		
Setup data for roster are stored and recreated for roster period		
Template roster entries will be processed producing invoice date / payroll		
Service Reports for HACC and NDIS		
Task setup is used to record services for the HACC / CSDTA - MDS reporting -- National Disability Insurance Scheme (NDIS)		
Bulk claims upload is integrated for NDIS – linked to the NDIA portal		

Disability Insurance Scheme (NDIS)

The **bulk upload claims interface** will allow providers to upload a file with claim requests exported from the **Client Care Record (CCR)** and import for processing into the NDIA Provider Portal Web Application.

Error processing facility will allow to import error files from the NDIA portal into the **CCR**. After correcting the errors the file can be re-submitted to the NDIA portal.

Software features in CCR	Y/N	Comments
Client Care Roster - linked to payroll		Cont.
Roster Management		
Automatic availability search for roster date/ time – list available Workers		
Available workers are search using availability setup, not already rostered, not absent(on holiday etc) Further search option are entered to find best match: Gender, Location, Language, Qualification and distance to client(GPS)		
Suburb to Suburb search – Identify Care Workers closest to client: eg. Find Care Workers in a radios of 10 km to the client.		
Un-assigned shifts *(empty) will be listed for roster period		
Shifts need to be confirmed to ensure Care Worker is informed		
Un-confirmed shifts will be listed for roster period		
Cancelled shift can be enter for later analysis		
Monitor Client roster and Payroll data – list both data sources		
Shift changes: change Date and time – re-assign Care Worker Re-calculate invoice data and payroll automatically		
Automatic availability search for roster date / time		
Available workers will be search via availability setup, not already rostered, not absent(on holiday etc.) Further search option to find the best match: Gender, Location, Language, Qualification and distance to client(GPS)		
Suburb to Suburb search – Identify Care Workers closest to client: eg. Find Care Workers in a radios of 10 km to the client.		
Un-assigned shifts *(empty) will be listed for roster period		
Shifts need to be confirmed to ensure Care Worker is informed		
Confirmed shifts are processed for invoicing and payroll		
Un-confirmed shifts will be listed for roster period		
Cancelled shift can be enter for later analysis		
Monitor Client roster and Payroll data – list both data sources		
Shift changes: change Date and time – re-assign Care Worker Re-calculate invoice data and payroll automatically		
Travel Allowance and Volunteer re-imburements		
Calculate travel allowance using GPS data – Travel Distance /Time Start shift from HQ to Client --- optional Start shift from Employee Address --- optional Enter Travel Distance / Time between Clients		
Manage Travel Allowance payments for shift breaks – interval setting		
Pay Travel Time using GPS data – optional setting		
Charge Client Call Out fees based on travel distance and/or travel time		
Reimburse Volunteer's travel expenses – using GPS data / Travel distance		
Manage Volunteers reimbursements adding other costs and create an reimbursement report for accounts		
Roster waring setting: Warning for next 2 days displaying “Empty shifts” and “un-confirmed” shifts Ensure Client Care Worker is assigned and is informed of roster date/time		
GPS data setup		
Automatic download GPS data from Google maps: Client / Volunteer / Employee address search		
Client A to Client B travel distance and time download to database		
Client suburb and Employee/Volunteer suburb connection update: Store all connections between clients and all Employees/Volunteers		
Suburb to Suburb travel distance and time download to database		
Automatic update of new Suburb links eg. New client suburb is entered and all links (Suburbs) to Care Workers are updated		
GPS data information service		
Lookup Care Worker daily roster plan and open Google maps for all shifts on the day --- Display map with total travel distance / travel time Option: Reorganise travel route to minimize travel distance		
Adjust roster to include travel distance between clients Variable setting for times between shifts Minimum hours can be set before shifts are adjusted		
Lookup single shifts between Clients – display GPS map		

Software features in CCR	Y/N	Comments
Client Care Roster - linked to payroll cont.		
Report setup for Client and Care Workers		
Notify Care Worker via SMS and Email – extensive reporting available		
Roster can be emailed to Client and Care Worker via PDF files		
Roster reports can be produced for contractors		
Client care information and service instruction can be included and accessed on Mobile Phones (addressing confidentiality issues)		
Absent Periods for Employees / Volunteers		
<i>Record Employees absent period:</i>		
Select payroll option: Annual Leave, Personal Leave, RDO etc.		
Volunteers absent period: record period when not available		
Absent period will delete Client Care Worker and Payroll data will be changed to leave entitlements.		
Shifts will be marked as “Empty” and listed for reassignment		
Absent Periods for Clients		
Absent periods can be deleted for selected period and roster is adjusted – payroll data are deleted		
Absent times can be recorded as “cancelled “ shift -		
“Cancelled” shifts can be charged – eg. Late notification		
Will be automatically deleted in the payroll		
Detailed reporting is available on “cancelled” shifts		
Availability Search – Employees/Volunteers		
Qualification search only: Find Care Worker with certain qualification		
Availability search only: Find Care Worker for certain Date / Time		
Availability search for roster entry: Find available Care Workers		
Client specific Care Workers		
All available Care Worker		
List all Care Worker and display roster information / GPS data		
Further search option are available: Gender, Language, Suburb, GPS		
Care Worker List includes Travel Distance/Time to Client		
Daily roster times for Care Worker will be displayed – list of clients		
Client Invoice setup		
Select Invoice Cycle – Monthly, Fortnightly, Weekly		
Select Invoice Recipient: Client, External Service		
Separate invoice setup for Client / External Services Invoices		
Process Invoice Payments – manage part payments		
Invoice reconciliation forms for Client and External Service invoices		
Print / Email Invoices – Detailed / Summary invoice options		
Produce Debtors Aged Trial Balances – split reporting / Client – External serv.		
Payment entry via client list (tick box) – fast payment processing		
Enter Payment Adjustments and Write Offs		
Calendar based reporting – various report designs are available		
Service Report Summary – Direct Service / Centre Based Service		
Analyse client services – display graphs		
Analyse services breakdown – Aged, Mental Disability, Intellectual, Autism, Disability general, Other		
Report on: Non-Indigenous, CALD, New		
Search facility for Local Government Area Search and period report		

Software features in CCR – SmartPayroll	Y/N	Comments
Group Service - Service Projects		
Setup Service Projects - Group Activities		
Setup group activity with detailed description incl. risk assessment		
Produce activity manual – staff/volunteer instruction		
Setup Group Funding arrangements – manage Government subsidies		
Setup group participants – incl. fees setup – invoice Client / charge Fund		
Create activity record – tick box selection for participants		
Manage Income / Expenses for group activity		
Record Client fees – Income can be varied for each Client		
Record Fees and other activity cost paid by Client (incl. GST tracking)		
Record Expenses:		
1 General Expenses: Petrol – Parking Fees – Tolls for Bus – Other Expenses		
2 Employee Cost: calculate wages including loadings and allowances		
3 Volunteer Reimbursement: Produce reimbursement reports for accounting		
3 Use Contractor for group service and record Contractor expenses		
Manage Cash Advance for Group Activity		
Calculate Expenditure estimates for Cash Advance –		
Produce actual expenditure calculation after the event and print statement		
Produce Client Invoice for Group Activity / Print Statements for Fund Manager		
HACC – HADS Mds reporting		
Client Assessment / Notes		
Calendar based data entry with assessment scale (1-10)		
Compare Client group involvement over time – display graph		
Client Care Plan		
Care plan Library for easy care plan writing		
Monitor participation rate and group demand		
Record group participation rate		
Record cancelled activities		
Record “Unmet Needs” – Interest in group activity		
Eg. Client ask to participate in group activity, however, the group is full		
Produce calendar based reports and graphs		
Bus Schedule		
Bus Code Setup – trip information		
Setup option		
Bus trip option: Bus is used for Pickup client / Bus trip from fixed location		
Enter Task setup --- determines the Bus fees		
Manage Bus drivers – enter regular Bus drivers from list (selected Employees/ Volunteers only – holding a valid bus licence		
Record Bus trip Group Service Project – link bus trip to group activity		
Select regular support worker for Bus trip (max.4) Employees/Volunteers		
Setup HADS funding to record Mds records		
1 Record Bus trip - 2 Record Social activity hours - 3 Record Meals provided		
Bus Information: Record Bus details – seating –Hoist – Rego – Insurance etc.		
Bus Incident Report Form: Record Accidents/Incident report form		
Bus run option		
Enter / change Bus driver --- search engine for available bus driver		
Enter Bus Rego number --- identify Bus used for bus trip		
Record bus trip hours - used for statistical info – bus driver / volunteer hours		
Record Support Workers for bus trip (max.4): Employees / Volunteers		
Calculate Clients pick-up time – automatic GPS lookup for travel distance		
Display Google map for all pick-up points – show total duration / trip distance		
Optimise Bus run using Google maps and re-sort trip schedule / pick-up time		
Bus run report print options		
Print / Email Bus run in pick-up order		
Print / Email Bus run in pick-up order including Client care information		
Calculate Walking Aids on Bus – include bus driver instructions		
Venue Information Record		
Venue description – Accessibility – Toilets - Parking – Road -		
Venue rating - Comments and recommendations		
Venue web link and email facility		

Software features in CCR	Y/N	Comments
Employee / Volunteer / Supporter Record		
Employee records setup – entered via SmartPayroll (see below)		
Volunteer / Supporter basic data record		
Personal details incl. picture		
Employee database and Volunteer databases		
Police check record – incl. working with children check		
Monitor expiry dates		
Availability setup : Mon – Sun – with time restrictions		
Detailed volunteer preferences – abilities – gen. Availability report		
Accident / Incident Report – incl. OHS reporting		
Monitor action taken		
Complaints and Suggestions recorded by Clients / Staff / Relatives etc.		
Monitor action taken		
Record complaints type to analyse similarities		
Performance Appraisals – compare performance over time		
Record Training and Education -		
Monitor expiry date for training certificates – Expiry date reports		
Mail Merge facility		
Create Category for mail merge links – sort folder names		
Save document LINK on database		
Link documents on your network to the database		
Open documents (any file format) and mail merge with client record		
Save mail merge document in Client file – option of saving mail merge documents in client file		
Print Clients' birthday lists and merge file (birthday letter)		
Save and open Web Links – sort links into categories		
Document links to Client file		
Save relevant documents (any file format) and rename docs to include Client ID - (docs are easily identifiable)		
Access all Clients docs via the database		
Scanned Documents links to Client file		
Save relevant scanned documents (picture formats) and rename docs to include Client ID - (docs are easily identifiable)		
Access all Clients scanned docs via the database		
Supporter Database - Manage Donation receipts		
Manage Donation receipts – monitor payments		
Regular payment setup – Monthly – Six monthly – Yearly pmt option		
Record payment details – Credit Card – process payments		
Produce payments receipts		
Email / SMS facility -		
Email receipts with Thank You letter		

Software features in SmartPayroll	Y/N	Comments
SmartPayroll		
Payroll Setup options		
Payment Cycle – Weekly – Fortnightly – four weekly – Monthly		
Award setup – unlimited – Award variables are used to manage awards		
Tax information and web links – updated periodically with program updates		
Public Holiday management – different setup option for different Awards		
Payroll Tax setup for various stats		
Payroll Access setup		
1 Database access password		
2 Employee access password Access lever 1 – 3 plus access rights for selected users		
3 Administrator password setup to change database access		
4 Department /Cost Centre password setup		
Employee setup option		
Employee status: Full Time – Part Time – Casual ----- Day/Shift Worker		
Pay Wages / Salary option		
Allowance setup --- paid per working hour --- fixed allowance payments		
Entitlements: Annual / Personal / Unpaid / Maternity Long Service Leave, RDOs, Sundays / Public Holidays worked		
Monitor Salary Sacrifice		
Time Attendance setup		
Entitlement Planner --- enter Annual Leave etc. months ahead		
Create Roster Templates -- allow 4 weekly intervals – differ in each week		
Enter Roster Time – Actual Working hours separately		
Option to connect to external recording device – Time Clock -		
Compare Roster Start/Finish with actual times and process payment		
Process payroll correction - add/delete payment / correct entitlements etc.		
Process Allowances and Fringe Benefits		
Allow Hourly Rate changes per shift		
Allow Lunch Break changes per shift		
Add shift comments per shift		
Report Setup		
Calculate Superannuation and produce payment reports		
Manage Bank transfers to various Employee's bank accounts		
E-Banking – transfer Employees wages/salary to nominated bank account		
Produce Entitlement Liability reports		
Payment Summary reports for pay cycle incl. entitlement calculation		
Year-to-Date summary reports		
Payslips – incl. Email facility		
Group Certificate reports and ECI upload file for ATO		
Payroll Tax reports		
Various payroll summary reports – calendar based - Report period – Pay period reports		
Connect to other payroll systems		
Upload facility to create upload file to other payrolls		
Can be adopted to any payroll system – can be developed separately to suite in-house payroll		
Payroll data transfer via Pay Codes to synchronise both systems		

Software features in CCR	Y/N	Comments
Meals on Wheels		
Clients MoW service management – not covered under this section		
Create Meal Deliver Run Schedules		
Setup Client profile –		
Likes/Dislikes / Allergies / Diabetic – menu restriction		
Stock Take processing – incl. batch number records -		
Record delivery dates (frozen items) – manage stock rotation		
Setup menu item with meal content list		
Restrict menu selection for client – considering suitability		
Enter MoW order via Template setup – 4 weekly rotation option		
GPS coordinated meal run setup		
Invoicing and payment processing		
Extensive reporting incl. Meal labels with client info / O		
HADS – HACCC – MDS recording		
Booking Calendar – Location bookings		
Setup Locations / Rooms to be used for activities		
Access weekly calendar -- booking period from 7:00am to 9:00pm		
Enter booking in half hourly interval – coloured box display		
Record booking info: Employee / Client / Projects and booking comments		
Record recurrent time entries for selected period: Daily / Weekly / Monthly incl. Weekday setting		
Print / Email booking schedule		
Staff Calendar - Staff / Volunteers Appointments		
Select Employee or Volunteer		
Access weekly calendar -- booking period from 7:00am to 9:00pm		
Enter booking in half hourly interval – coloured box display		
Record booking info: Location / Client / Projects and booking comments		
Record recurrent time entries for selected period: Daily / Weekly / Monthly incl. Weekday setting		
Print / Email booking schedule		
File Manager		
Network File Management – CCR folder is used as the default directory		
Create a File Directories structure – for up to 3 sub-folder categories		
Lock sub-folder setup with Administrator password		
Lock sub-folder setup with Employee password - create Private folders		
Add files to sub-directory – or – link files within your network setup		
Assign file access levels – 1 Leven 1-3 and/or enter selected employees		
Manage folder access setup for all documents in folder – change access		
Create new access level for all files in sub-folders		
Client File anagement		
Files will be saved to the Client document folder – sub-folders will automatically be created with ClientID and LastName -- eg.5-Black\		
Setup functionality is the same as in the Network File Manager		
Employee/Volunteer file management		
Files will be saved to the Employees document folder – sub-folders will automatically be created with EmployeeID and LastName -- eg.2-Smart\		
Setup functionality is the same as in the Network File Manager		