



Twilight Aged Care

Company Facts

- Location: Sydney
- Industry: Aged care services
- Number of Locations: Five
- Web site: www.twilight.org.au

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John Stuart, Chief Executive Officer | Twilight Aged Care

Success Highlights

Challenges

- Undeveloped and time consuming legacy information systems
- Business processes restricted by fragmented information
- Inconsistencies in documentation and uncertainty as to the accuracy of data
- Multiple redundant manual processes with duplication of effort

Solution

- Epicor Senior Living Solution (SLS)—A highly flexible ERP solution, designed specifically for the aged care industry, managing core financial and resident information

Benefits

- Scalable and flexible ERP platform to support growth and adoption of future information systems
- Central repository and consolidation of resident, finance and clinical information
- Elimination of manual data entry processes and increased confidence in the integrity of data
- Increased access to information across the organisation
- Automation of the government's subsidy claim process under ACFI

Twilight Aged Care (TAC) is a not-for-profit aged care organisation. Originally known as Twilight House, TAC was established as a private charity in 1915. TAC offers low and moderate high care accommodation for seniors at four hostels based on Sydney's North Shore including: Glengarry in Mosman, Horton House in Gordon, Glades Bay Gardens in Gladesville and Jamieson House in Beecroft.

With 160 residents, TAC's primary aim is to provide homes to men and women who need care and to offer their support to their families. The organisation is committed to providing the highest quality holistic care and services to its residents, allowing them to maintain independence, individuality, dignity and quality of life in a safe and supportive home-like environment.

Challenges

Twilight Aged Care (TAC) Chief Executive Officer, John Stuart, was appointed to lead TAC in 2004. He conducted an initial analysis of the management issues facing the organisation and identified a number of problems relating to information management. Specifically, he found that the organisation's business processes could be improved through better information management.

Stuart said, “It was clear that in order for the company to move forward there needed to be an investment in an information network and sophisticated computer based information systems.”

“Prior to 2004 our information technology was limited in application and there were only basic computer software systems in place to manage finance and accounts and some limited resident information. The legacy systems were undeveloped and mostly manual systems. Several repositories of information existed resulting in uncertainty as to the accuracy of our data. Where functions were computerised, integration was not available which resulted in a duplication of effort,” Stuart continued.

The existing network did not provide TAC with an opportunity to maximise the use of information across the organisation and the legacy systems could not be integrated. While varying use was made of email and internet resources, there was a low level of computer literacy amongst the managers and staff.

“We were using MYOB, MS Access, and paper files. Our information technology systems were limited in sophistication but had served the purpose of providing a local area network, peer to peer, at the head office and an ADSL modem to connect to the internet and receive email. All facilities had a varying number of stand-alone PCs with ADSL modem access for internet and email for facility managers,” explains Stuart.

The most pressing information management issue was the fragmentation of information relating to residents in the hostels and the laborious manual processes relating to the management of financial information. The solution chosen would also need to provide the ‘back bone’ information system to which other applications could be interfaced.

The management of clinical data, care assessments, care plans, clinical notes, incident reporting and care classification was undertaken manually by staff at each site. Reconciliation of subsidy income to claim data was also manually undertaken and was laborious and prone to error. Subsidy income was recorded in one cost account rather than being broken up into its component parts. There were discrepancies in systems across the organisation in the assessment and care planning process, but more importantly, there was inconsistency in the documentation of care delivered and this had resulted in a loss of subsidy when resident records were audited by the government. Not only was there a loss of funding on the basis of lack of evidence to support claims, but it was often possible that a higher classification could be achieved for some residents on the basis of the care delivered but not documented.

Stuart explains, “Regular review of progress notes and other clinical information provided opportunities to reclassify residents and our practices did not support the capturing of information that might assist in revisiting the care plans for comparison with care delivered.”

“We really lacked a centralised system whereby we could effectively manage all resident and client data, as well as our financial data,

including subsidies provided by the government. We needed something that could operate across all four hostels. A robust financial and CRM system was critical to the future integration of related systems,” Stuart continued.

TAC introduced Epicor Senior Living Solution (SLS), a complete ERP solution that would form the backbone of a fully integrated, scalable and flexible information system.

Solution

TAC selected Epicor SLS after reviewing a number of vendors in the market place. The ERP solution was chosen primarily because of its proven track record in the aged care industry. TAC felt that the solution was not only very strong from a resident management perspective, but it also had a robust and flexible finance platform.

Stuart explains, “We identified Epicor as an international leader and expert in its field. As a result we felt confident it would be a great fit for our organisation and could match our specific needs. We realised early on that other products, including SAP, just weren’t up to scratch when it came to combining the two capabilities we required the most, in resident management and finance. Not only could we raise the bar of resident care because of increased transparency, SLS also had a strong reporting component where we could clearly analyse data and run financial reports.”

The implementation of Epicor SLS took five months to complete. The solution went live in December 2005: The first phase in a series of implementations and future adoptions.

“We did a lot of work pre-implementation which involved going through our paper files and financial data and entering it electronically so that the information would be there to import when we began the actual implementation process. We restructured our chart of accounts to achieve a standardised system across the organisation and added additional cost accounts to further break down subsidy payments. To do this we employed a Project Accountant to help with the translation of data,” explains Stuart.

“Most of our resident related data had to be entered manually. While this was a time consuming exercise, it provided us with an opportunity to audit the information we had stored in multiple locations and rectify discrepancies across the various data collections. By the end of this process we finally had a single source of accurate information about our residents and new information about prospective residents and our facilities,” Stuart continued.

The implementation was initially developed to replace TAC’s legacy finance and resident management systems with an integrated ERP solution to manage finance, accounting and resident data. However, the initial Epicor implementation also provided the backbone for future system adoptions. Stuart knew that this first stage was only the beginning of a bigger task. His previous experience in capital

works provided him with an insight into the state's plans for eHealth initiatives and industry compliance.

"It was clear from early on that we would be introducing new information systems in the future so the backbone system, the Epicor system, had to have a great deal of scalability to integrate with future adoptions," explains Stuart.

In 2007 TAC adopted iCare, a clinical and care management solution. iCare's fully integrated medication management system is used by TAC's registered nurses, personal care assistants, nursing assistants, as well as the facility management team. The seamless integration between the new iCare system and the Epicor solution proved of great benefit to the organisation.

"iCare and Epicor are interfaced and share information between the systems. For example, admitting a resident in Epicor automatically triggers a care record in iCare. Once a resident has been admitted to a facility, we create an 'episode of care', using Epicor SLS, which automatically creates an incidence or entry into iCare. Epicor and iCare have created a competitive advantage through the ease of integration they have built into their systems," says Stuart.

The Epicor implementation streamlined the organisation's management of information. With Epicor in place it became possible for TAC to remit information electronically to Medicare Australia and the Department of Health and Ageing on all aspects of resident admission and discharge, including the monthly claim for subsidy.

By the end of 2006 all data transactions relating to subsidy claims and payments were made from a single point of contact, rather than being managed individually at each site. This ensured that all information was transmitted in a timely manner and avoided the possibility of late subsidy claim submissions.

Following the government's introduction of the Aged Care Funding Instrument (ACFI) in March 2008, TAC was fully prepared for the changes ACFI represented to the aged care industry. ACFI is the classification instrument underpinning the funding model to pay subsidies to Residential Aged Care Services. As part of the government's \$1.6 billion 'Securing the Future of Aged Care for Australians' initiative, ACFI enables aged care providers to process care assessments electronically.

On 20th March 2008, TAC was the first aged care provider in Australia to submit an ACFI claim electronically. Additionally, Epicor was the first software vendor to receive a notice of integration by Medicare Australia for online claiming under ACFI.

"Epicor was incredibly supportive in the build up to the introduction of ACFI, as well as other legislation being introduced in the government's aged care initiative. They made it very simple for us to accommodate all the necessary changes, which in many cases were particularly complex. They helped automate the entire process which would otherwise have been a very laborious and complicated task," explains Stuart.

In 2008 TAC added two new Epicor modules to their system: Epicor e-Business and Epicor DocLink. "Epicor e-Business allows for transmission of documents to Medicare Australia. We implemented the module to allow for transmission of all resident related events generated by triggers in the information systems. We also added Epicor DocLink, this allowed for timely approval and payment of invoices. All paper invoices are captured electronically and forwarded to the appropriate manager for approval. Historical invoices are always available online for reference associated with the payment record, eliminating our reliance on paper documents," says Stuart.

In 2009 TAC added Epicor Performance Canvas and Roster Live. "Performance Canvas provides our managers with up to date information on financial outcomes that are accessible in real time. Drawing from the general ledger, the reports can incorporate financial and non-financial data and can be customised. At present our managers can access real time information on occupancy, operating costs per bed day and other information about income and expenditure," explains Stuart.

Roster Live is a human resources system aimed at improving the accuracy of personnel information and time and attendance management.

"Our payroll process prior to Roster Live involved manual timesheets. Information was processed by an external company and we didn't have ready access to historical information. Since bringing payroll in house and implementing Roster Live, we have eliminated repetitive and redundant processes, we have accurate time and attendance data, accurate costing information on rostering and deployment of staff, compliance with Fair Work Authority data management requirements and most importantly, a huge reduction in errors and staff complaints. Roster Live uses biometric scanners for staff to sign off and on. This gives us a 0.1% error rate in employee transactions and helps to reduced fraud," says Stuart.

In 2011 TAC implemented Epicor eRequisition. The Epicor Enterprise Resource Management solution module completes the software suite and closes an open loop in TAC's purchasing process.

Stuart explains, "Previously orders for goods and or services were paper based and not readily reconcilable with invoices received for payment. The gap presented a significant risk in regards to expenditure management. Following the implementation we have controlled purchasing expenditure through the integration of budget information from the General Ledger with the purchasing system and our internal delegation of authority limits. Should an order be entered into the system which exceeds the monthly budget available in a particular cost centre, is a capital item, or exceeds the staff member's delegations, the system automatically escalates it to me or the Finance Manager for approval" says Stuart.

Benefits

TAC has experienced substantial benefits since implementing Epicor SLS in 2005 and has continued to do so with the subsequent adoption of additional SLS modules. Epicor has played a key role in enabling TAC as an industry leader in business and information processes and continues to support the organisation to achieve the highest standards of resident care.

The Epicor system has allowed for a consolidation of information across the TAC group via a single point of reference and has eliminated the double entry of data giving the business a much greater confidence in the integrity of its information.

“Being able to retrieve information from anywhere in world at any time is an enormous benefit. The information accessed through Epicor is updated with new data in real time. We now have one central repository where all information is stored and can be easily accessed. We now get real value from our data whereas before we were slaves to it,” says Stuart.

Stuart continues, “We are now in a position to analyse data and add value to the information. Access to information has been the biggest benefit achieved and in particular allows us to have a Manager or Registered Nurse on call to assist staff with managing clinical problems. Managers can also access all information on a resident from their remote site or from home.”

With the increased complexities of information management requirements in the aged care industry, it was important that TAC’s systems allowed them to put their energy into value-add business processes. The productivity of the finance team has also improved dramatically as a result of implementing Epicor. The new system allows the finance team to focus on management accounting, whereas previously their time had been consumed by number crunching.

“We have also enjoyed significant success in the improvement of our financial processes not only in terms of resident records and payments but also in terms of compliance and reporting,” says Stuart.

“Not only did we have the capacity to comply with the changes that came into effect to legislation in prudential reporting and

compliance in 2006/07, we have also enjoyed increased productivity. The funding changes introduced in 2008 resulted in a far more complex classification system with more permutations. Through Epicor we have managed the changes in the regulatory environment seamlessly,” Stuart continues.

The easy integration of the Epicor and iCare systems was one of the main factors in the continued advancement of TAC’s business processes.

Stuart explains, “The implications of the two systems have been enormous and will continue to be so. Epicor and iCare have provided a backbone allowing us to continually improve our systems and adhere to changing regulations. We are in a position where we can take advantage of industry changes and new trends. In 2010 we purchased a new home and we were able to integrate the information and operations of the site with the organisation’s overall processes almost immediately. The systems we now have in place allow us to grow and expand in the future with little trepidation.”

“Given Epicor’s ability to work seamlessly with iCare, and vice versa, we have also garnered significant benefits in the area of documentation management. It has created a series of administrative tools to manage and control resident care, driving greater efficiencies through the business and freeing up additional resources to dedicate to resident care. Essentially, we have improved the quality of documentation required for accreditation. This is highly important in our industry,” continued Stuart.

About Epicor

Epicor Software Corporation is a global leader delivering business software solutions to the manufacturing, distribution, retail, and service industries. With more than 40 years of experience, Epicor has more than 20,000 customers in over 150 countries. Epicor solutions enable companies to drive increased efficiency and improve profitability. With a history of innovation, industry expertise, and passion for excellence, Epicor inspires customers to build lasting competitive advantage. Epicor provides the single point of accountability that local, regional, and global businesses demand. For more information, visit www.epicor.com.



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