
First Choice Home Health Consultation Writeup

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Overview

From our discussions on Oct. 9th, in our understanding, the areas which could most benefit from investment in software systems are:

- Scheduling of employees with clients
- Converting the schedules into completed units for billing to clients as well as units for payroll to employees (which includes reconciling work performed with the daily visit log)
- Converting the completed units into invoices (especially for Private Pay clients)
- Information sharing to employees, particularly in terms of sharing notices or information updates with changes that are relevant to all employees

It is our recommendation that the software which best addresses these areas is a combination of industry-specific Home Health Care Software and generic Weblog Software (Blog Software).

Our research found that there is an abundance of software specifically targeted at your industry, and which addresses nearly all of the areas of interest mentioned above as well as several others; particularly for management of client information (demographic information, OASIS forms, location information, plans of care, etc.) and business analysis reporting features which are likely to be highly useful as your business expands. Several of the programs we considered even include reconciliation features that are very similar to your current procedure for verifying completed work against the daily visit record to ensure that each scheduled appointment was completed. We realize that this is a significant investment, particularly at this time, but we highly recommend that you consider the targeted software. It will undoubtedly increase efficiency in the short and long terms and the earlier the software is adopted, the less information entry will need to take place.

In addition to the industry-specific software, we suggest the use of Weblog Software (commonly called blog or blogging software) for facilitating communication with employees. Although some of the home healthcare software includes features for sending messages to employees (often via email or in a similar manner), none included the rich feature set or ease of use that is available in current blog software. The blog software would allow you and the office staff to post notices to employees and provide a repository of information that could be accessed anywhere to check for updates and review previously received information. Software in this category is also designed with a focus on ease of use (both for you as the administrator/poster and for the field employees as users) and quality visual presentation. Also, the market for blog software is mature enough that prices are low and the fundamental features that you will need are nearly universal. Investing in blog software is strongly recommended, regardless of whether or not you decide to invest in the industry-specific home health care software.

In the sections below, we examine in detail the available software in each of the categories and make specific recommendations about which software we found to be most appropriate for your business.

Home Health Care Software

Desired Functionality

Rather than focusing on an individual function or area for improvement, software in this category is targeted at a broad range of functionality relevant to the Home Health Industry. All of the software in this category attempts to address issues of scheduling, time tracking, client and employee management, and billing.

Available Software

Below is a listing of the software which was evaluated as part of this consultation and a list of the software which is notable in this category, but was not considered. The overall rating assigned to each software is highly arbitrary, but is intended as a quick guide to the suitability of the software. A question mark next to the rating indicates that the rating is highly speculative (due to a significant lack of information on which to base the rating).

Table 1. Available Software

| Rating | Name | Creator | Website |
|------------|--|-----------------------------------|---|
| ★★★★★ | Alora Home Health Software | Alora Healthcare Systems, LLC | http://www.alorahealth.com |
| ★★★★★ a | Ankota Home Care Scheduling Software | Ankota | http://www.ankota.com/home-care-scheduling-software/ |
| ★★★★? | Agency Manager | Kinnser Software, Inc. | http://www.kinnser.com/agency_manager/ |
| ★★★★★ | CareAnywhere | | http://web1.careanywhere.com/Homecare/Products/Overview/tabid/84/language/en-US/Default.aspx |
| ★★★★★ | CareVoyant Home Care | CareVoyant, Inc. | http://www.carevoyant.com/solutions_homecare.aspx |
| ★★★★ | Client Services Manager/ Personal Care Services | AdvanTec Information Systems, LLC | http://www.findsocialservicesoftware.com/CMS-PCS.aspx |
| ★★? | Encore® Suite (Encore® Financials) | Delta Health Technologies, LLC | http://www.deltahealthtech.com/products/encore_financials/ |
| ★★? | Generations Home Care System | Integrated Database Systems | http://www.idb-sys.com |
| ★★ | Harmony Health Care Management System | American Health Care Software | http://www.ahconline.com |
| ★★★★ | HealthMEDX Vision | HealthMEDX | http://www.healthmedx.com/Solutions/HomeHealth.aspx |
| ★★★★ | HomeCare Billing Solution | HomeCare Accounting Solutions | http://www.has-software.com |

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| Rating | Name | Creator | Website |
|--------|------------------------------|--------------------------------|---|
| ★★ | HomecareNet | Healthcare Automation | http://www.healthcare-automation.com/homecarenet.htm |
| ★★ | Home Health Informatics | Home Health Informatics, Inc. | http://www.homehealthinformatics.com |
| ★★ | HomeRun | White Oak Systems, LLC | http://www.whiteoaksys.com |
| ★★ | HomeSolutions.NET | Sansio | http://www.sansio.com/homesolutions.asp |
| ★★★★ | HomeTrak | HomeTrak, Inc. | http://www.hometrak.com |
| ★★ | Maestro | Patient Care Technologies | http://www.ptct.com/pages/businessintelligence.htm |
| ★★★★? | myhomecarebiz.com | | http://www.myhomecarebiz.com |
| ★★★★★ | Service Agency Manager (SAM) | RiverSoft, Inc. | http://www.riversoft.net/index-1.html |
| ★★★★ | Soneto | Stratis Business Systems, Inc. | http://www.stratisinc.com/PowerfulSoftware/Soneto.aspx |
| ★★★★ | VisiTrack | Focal Point Systems | http://www.visitrack.us/ |
| ★★★★ | Visit Wizard | August Systems, Inc. | http://www.august-systems.com/home_care_agency_software.php |

^aThe rating of this software is in reference to the scheduling feature specifically. See the Feature Analysis for further information.

Table 2. Software Not Considered

| Name | Creator | Website | Reason |
|------------------------------|-------------------------------|---|---|
| CareField Healthcare Systems | | http://carefield.com/?page_id=223 | No information, nothing to advertise it to Home Healthcare companies. |
| VISIONS | Accounting Systems Technology | http://www.ast-visions.com/ | Too Expensive (only purchase, \$7950. No substantial information available. |

Software Pricing

Clearly the cost of software is a serious consideration in choosing a software product. The table below details the cost breakdown for each software product. Most of the software considered requires a tailored quote from the creator of the software, which is why the table is highly incomplete.

The licensing for all software considered is either a Proprietary licensing scheme, in which the software is licensed from the creator for installation on your system, or under the Software as a Service (SaaS) model in which the application is hosted by the creator and you access the system but never download or install any software on your own computer.

Table 3. Software Pricing

| Name | Purchase Cost | Setup Cost | Monthly Cost | Training Cost | Upgrade Cost | Support Cost | License |
|---------------------|---------------|------------|----------------------|---------------|--------------|--------------|-------------|
| Agency Manager | | “low” | | \$0 | \$0 | \$0 | SaaS |
| Alora (Single-User) | | \$1175 | \$275 (first 5 free) | \$0 | \$0? | | Proprietary |
| Alora (Multi-User) | | \$1775 | \$425 (first 5 free) | \$0 | \$0? | | Proprietary |
| Ankota | | | | | | | SaaS |

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| Name | Purchase Cost | Setup Cost | Monthly Cost | Training Cost | Upgrade Cost | Support Cost | License |
|---|---------------|------------|----------------------------------|------------------------|--------------|-------------------------|---------------------|
| CareAnywhere | | | | | | | SaaS |
| CareVoyant | | | | | | | SaaS? |
| CSM/PCS | | | | | | | SaaS? |
| Encore® Financials | | | | | | | |
| Generations | | | | | | | Proprietary |
| Harmony | | | | | | | Proprietary or SaaS |
| HealthMEDX Vision | | | | | | | Proprietary or SaaS |
| HomeCare Billing Solution | | | | | | | |
| HomecareNet | | | | | | | Proprietary or SaaS |
| Home Health Informatics | | | | | | | SaaS |
| HomeRun | | | | | | | Proprietary |
| HomeSolutions.NET | \$0 | | | \$0 | | | SaaS |
| HomeTrak (Rented - Small Company Program) | \$0 | \$0 | \$150/mo | \$0 | \$0 | 1 hr free (3 first mo.) | Proprietary |
| Maestro | | | | | | | Proprietary |
| myhomecarebiz.com | | | | | \$0? | | SaaS? |
| Service Agency Manager | \$0 | \$600 | \$600/5-user + \$120/user | \$220/session (min 10) | \$0 | | Proprietary |
| Soneto | | | | | | | Proprietary or SaaS |
| VisiTrack | \$0 | \$0 | \$199 (Single) \$399 (5-user) | Initial is free | \$0 | \$0 | Proprietary |
| Visit Wizard | | | | | | | Proprietary |

Feature Comparison

The most important question when considering the purchase of new software is “What does the software do?” The set of features provided by a piece of software strongly affect the price and the decision of which software to purchase. To answer this question, we have compiled the following matrix detailing the available features in each software package. A question mark next to an entry in the feature matrix indicates that the presence or lack of a feature was inferred from other details but was not specifically mentioned. Also note the following features which were not included in the table because they are present in all software tested:

- All systems considered are HIPAA compliant.
- All systems provide a user-level access system where each user of the system is assigned a username/identifier and a password that they use to identify themselves to the system. Software packages which support multiple offices provide access controls such that users can only view information in their assigned office.

- Any software which includes a scheduling feature is able to print summaries of the schedule on both a weekly and monthly basis in aggregate or for particular clients and/or employees.
- Any software which includes both a scheduling feature and a billing/invoicing feature has some mechanism of converting schedules into billable time. Exceptions to this rule are noted in the section called “Feature Analysis”.
- Any software which includes a billing feature can handle Medicare, Medicaid, Insurance, and Private Pay billing. They can also distinguish payer information from client information and associate payers with clients and can setup custom billing schedules per-payer.

Column Descriptions

| | |
|-------------------|--|
| Modules | Is the software composed of components (modules) which can be purchased/licensed separately? Software which is modular often has the advantage of being cheaper, by allowing the user to purchase only the components they need. Such software is also often less well-integrated between modules due to the requirements of operating with or without the other modules present. |
| Interface | <p>The user interface through which the program is accessed.</p> <p>“Rich” refers to a rich-client interface, which is a “desktop application” in the traditional sense which connects to a shared database server for information storage. This interface typically offers the most flexibility, because developers can customize the interface in any aspect they choose, at the cost of more limited access to the program (the program must be installed on a computer to be used and must have more controlled access to the database than the others.</p> <p>“Smart” refers to a smart-client interface, which is an advancement of the rich-client interface in which the program (the client) is able to operate even without access to the database. This allows for (often limited) use of the program in conditions where database access is not possible, such as while traveling with a laptop.</p> <p>“Web” describes a web interface which presents the program in the form of a web page. The software is installed only on the server and can be accessed from anywhere with an Internet connection (assuming the server is configured to host the site outside the local network as well as internally). The interface is more limited, due to the constrained features of web browsers, but is often more familiar out of the box due to this conformity.</p> |
| Operating System | The operating system on which the software runs. The abbreviations used are “Win” for some version of Microsoft Windows, “2K” for Microsoft Windows 2000, “XP” for Microsoft Windows XP, “Any” for any operating system with a modern web browser. A + indicates that the software supports any later operating system in the same series (e.g. “XP +” represents Windows XP, Vista, and 7). It can be assumed that all software will run on Windows XP, due to its dominant market share. |
| Remote Access | Does the program provide a mechanism for accessing information away from the office? Note: Any program can be used remotely via Remote Desktop/VNC/LogMeIn/GoToMyPC, etc. This feature describes any feature which is part of the software for such access. |
| Referral Tracking | Does the system provide a means of tracking how clients are referred to your agency? If such a feature is present, the software will provide some sort of aggregate data about the referrals. |
| OASIS | Does the system handle standard OASIS information for clients? Any software which has this feature will be able to handle data-entry of OASIS information as well as import and export of the information in a standardized format. |

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| Plan of Care | Does the software support creation of a plan of care for clients? Any software which has this feature includes a plan of care which is compatible with form CMS-485 (exceptions noted below). |
| Physician Access | Does the system provide a means for physicians to get access to client information? Often this is accomplished by creating a username and password for the physician and providing them with a web address to access the system. |
| Telephony | In this context, telephony support refers to the ability of a system to allow employees to record their visit times using a telephone. Typically this is accomplished by having employees call a number when they start and stop work with a client, the system records the times and associates those with the schedule for the client in the database. Systems with this feature also often have the ability to record notes over the phone system for later review as well. |
| Telehealth | Systems which feature a telehealth component interact with some medical device for patient monitoring. These systems vary greatly in the features they provide and will need to be evaluated individually if this is a major factor in your purchase decision. |
| Track Client Info. | Does the system provide a means of tracking general client information (e.g. demographics, notes, other misc. information not specifically related to care)? None of the systems considered clearly fail to provide this feature, but it is seldom mentioned in their literature, so the information is included here for completeness. |
| Track Emp. Info. | Does the system provide a means of tracking general employee information (e.g. demographics, notes, preferences, etc.)? Most systems which include employee scheduling and/or client-employee matching must track this information, but as with client information it is seldom mentioned specifically. |
| Track Emp. Skills | Does the system provide a way of tracking the skillset for each employee (separately from their formal certifications)? Often this would include treatment specialties or other skill information which is not easily captured by their list of certifications. |
| Track Emp. Certs. | Does the system provide a way to track the formal certifications and eligibility requirements for employees? Any system which provides this feature will also provide a way of checking renewable certifications which are expiring or provide an automatic reminder about expirations. |
| Client Availability | Does the software keep track of client's availability when creating schedules? This availability time tracking is separate from preventing schedule conflicts (which is part of the scheduling feature) and includes entering client availability preference information, when available. |
| Emp. Availability | Does the system keep track of employee availability when creating schedules (in the same way as client availability described above)? |
| Scheduling | Does the system provide a way to schedule appointments between clients and employees? Any system which has this feature will detect and warn about scheduling conflicts. Some systems go farther in resolving these conflicts, such features are described in the section called "Feature Analysis". |
| Visit Notes | Does the system provide a way of recording client visit notes? |
| Payroll | Does the system provide payroll functions? Any system which supports payroll and scheduling will provide a means of converting completed schedules into payroll hours. |

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| | |
|----------------------|--|
| Emp. Reimbursement | Does the system provide a means of tracking employee reimbursement information and integrating this information into the payroll feature? |
| E-Billing | Does the system support electronic billing of claims to Medicare/Medicaid? |
| Billing | Does the system support traditional printed invoice billing? |
| Accounts Receivable | Does the system manage payment tracking in the form of accounts receivable, reconciling of remittances from Medicare/Medicaid, or any other system for tracking outstanding invoices? Any system which supports this feature and billing will convert billed invoices into outstanding invoices in the payment tracking system. |
| Document Management | Does the system provide the ability to manage patient documents? This feature describes managing custom documents, such as scanned documents and/or attaching files to a client's information stored in the system. It is assumed that all programs which create forms/documents as part of their operation will be able to manage (recreate, search, etc.) for the forms they create. |
| Multiple Offices | Does the system provide support for multiple, separate, offices? This includes user access restrictions as well as a clear distinction between offices for all of the information stored. |
| Billing Reports | Does the system provide summary information for the billing feature in the form of reports? Typically these would include revenue figures, billing breakdowns by client/payer, amounts outstanding (if it has the Accounts Receivable feature), and other billing-related summaries. |
| Employee Reports | Does the system provide summary employee information in the form of reports? This would typically include utilization information, work history, etc. |
| Client Reports | Does the system provide summary client information in the form of reports? Typically this would include care histories, census summaries, breakdowns by type of treatment, etc. |
| Report Customization | Does the software provide any means of customizing the reports that it provides or for creating new reports? It is assumed that all software makes use of a custom header/logo for reports which can use your company brand, so to have this feature the software must go beyond this level of customization. If the software provides this feature, the available customization options are described in the section called "Feature Analysis". |
| Export | What formats, if any, can the software save/export to? |

Table 4. Feature Matrix

| Software | Modules | Interface | Operating Systems | Remote Access | Referral Tracking | OASIS | Plan of Care (485) | Physician Access | Telephony | Telehealth | Track Client Info. | Track Emp. Info. | Track Emp. Skills | Track Emp. Certs. | Client Availability | Employee Availability | Scheduling | Visit Notes | Payroll | Emp. Reimbursement | E-Billing | Billing | Accounts Receivable | Document Management | Multiple Offices | Billing Reports | Employee Reports | Client Reports | Report Customization | Export | |
|--------------------|---------|-------------------|-------------------|----------------|-------------------|-------|--------------------|------------------|-----------|------------|--------------------|------------------|-------------------|-------------------|---------------------|-----------------------|------------|-------------|----------------|--------------------|----------------|----------------|---------------------|---------------------|------------------|-----------------|------------------|----------------|----------------------------|-----------|--|
| Agency Manager | | Web | Win? | ✓ | | ✓ | | | | | | | | | | | ✓ | | ✓ | | ✓ | | | | ✓ | | | | Excel, Word, PDF, RTF | | |
| Alora | ✗ | Rich? | Win | ✗ | | ✓ | ✓ | | ✗ | ✗ | | ✓ | | ✓ | ✗ | | ✓ | | | ✓ | ✓ | ✓ | ✗? | | ✓ | | | | Excel, Word, PDF, RTF | | |
| Ankota | ✓ | Web | Any? | ✓ | | | | | ✓ | ✗ | | | | | ✓ | | ✓ | | ✗ | | | | | | ✓ | | | | Excel | | |
| CareAnywhere | ✗ | Web | XP+ | ✓ | ✓ | ✓ | ✓ | ✓ | | | ✓ | ✓ | | | ✓ | | ✓ | | | | ✓ | ✗? | | | | | | | PDF, CSV, Excel, TIFF, XML | | |
| CareVoyant | ✓ | Web? | Win? | ✓ | | | | ✓ | | | ✓ | ✓ | | ✓ | ✗ | | ✓ | | ✓ ^a | | ✓ | | | | | | | | PDF, CSV, Excel, TIFF, XML | | |
| CSM/PCS | ✗? | Rich ^b | XP+ | ✓ | | | | | | | ✓ | | | ✓ | | | ✓ | | | | ✓ | | | | | | | | | | |
| Encore@ Financials | ✗ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Generations | ✓ | Rich ^c | XP+ | ✓ | | | | | | | | | | | | | | | | | ✗ ^e | ✗ ^e | ✗ ^e | | | | | | | | |
| Harmony | ✓ | | | ✗? | | | | | | | | | | | | | ✓ | | | | ✓ | | | | | | | | | | |
| HealthMEDX Vision | ✗ | Web | | ✓ ^f | ✓ | ✓ | | | | | ✓ | ✓ | | | ✓ | | ✓ | | ✓ ^g | ✗ ^h | ✓ | ✓ | ✓ ^g | ✗? | ✗? | | | | | HL-7, XML | |

^aMentions "passing payroll records to payroll system" but no payroll module. So, likely export of information to QuickBooks or other financial management system to do payroll.

^bImplemented with Microsoft Access

^cAlso includes web access if hosted by Generations

^dWeb access appears to be read-only. Generations@ Mobile Link runs on WinMobile 5+ and PalmOS 3.5+

^eIntended to be done through QuickBooks

^fAlso includes export to portable devices

^gProvided through company partnerships between HealthMEDX and other companies.

^hTracks mileage only.

Table 5. Feature Matrix (Contd.)

| Software | Modules | Interface | Operating Systems | Remote Access | Referral Tracking | OASIS | Plan of Care (485) | Physician Access | Telephony | Telehealth | Track Client Info. | Track Emp. Info. | Track Emp. Skills | Track Emp. Certs. | Client Availability | Employee Availability | Scheduling | Visit Notes | Payroll | Emp. Reimbursement | E-Billing | Billing | Accounts Receivable | Document Management | Multiple Offices | Billing Reports | Employee Reports | Client Reports | Report Customization | Export | |
|-------------------------|---------|-------------|-------------------|----------------|-------------------|-------|--------------------|------------------|-----------|----------------|--------------------|------------------|-------------------|-------------------|---------------------|-----------------------|------------|----------------|----------------|--------------------|-----------|---------|---------------------|---------------------|------------------|-----------------|------------------|----------------|----------------------|------------|--|
| HomeCare Billing System | X | | | | X? | ✓ | ✓ | | X? | X? | ✓ | ✓ | ✓ | ✓ | | | ✓ | | | | ✓ | ✓ | ✓ | X? | X? | ✓ | ✓ | ✓ | X? | | |
| HomecareNet | X | Rich or Web | 2K+ | ✓ | | | | | | | ✓ | | | | | | ✓ | ✓ | | | ✓ | ✓ | X? | | | ✓ | ✓ | | | | |
| Home Health Informatics | X | Web | | ✓ | X | ✓ | ✓ | X | X | ✓ ^a | ✓ | | | | | | ✓ | | | | | | | | | ✓ | ✓ | | | | |
| HomeRun | X? | Rich | | ✓ | | ✓ | | X | X | X | ✓ | | | | | | ✓ | | | | | | | | | ✓ | ✓ | | | | |
| HomeSolutions.NET | X | Web | | ✓ | | | | | ✓ | X | | | | | | | ✓ | | ^b X | | | | X | X? | X? | ✓ | ✓ | | | | |
| HomeTrak | ✓ | Rich | 2K+ | X ^c | ✓ | | | | X | X | ✓ | ✓ | ✓ | ✓ | | | ✓ | | | | | ✓ | X | X? | X? | ✓ | ✓ | | | Excel | |
| Maestro | X | | | | | ✓ | | | | | ✓ | | | | | | | | | | | | | | | | | | | | |
| myhomecarebiz.com | X? | Web? | | ✓ ^e | X? | ✓ | ✓ | | X? | X? | ✓ | ✓ | ✓ | ✓ | | | ✓ | ✓ | ✓ | | | | X? | | | | | | | | |
| Service Agency Manager | X | Rich | Win | X | ✓ | ✓ | ✓ | | X | X | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | X ^f | ✓ | ✓ | ✓ | ✓ | X | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | Excel, CSV | |
| Soneto | X? | Smart | XP+ | X? | | | | X | | | | | | | | | | | | | | | ✓ | | | | | | | | |
| Visitrack | X | Rich | Win | X | ✓ | ✓ | ✓ | | X | X | ✓ | ✓ | ✓ | ✓ | X | ✓ | ✓ | | ✓ | X? | | | X | X? | X? | ✓ | ✓ | | | | |

^aTelehealth is done through the separate well@home program

^bSupports "Gross Payroll" which I interpret as calculating totals from service hours, but no actual payroll functionality.

^cCan export schedules to Excel for use on mobile devices. Can also use integration with GenerationsUnits or RemCare to provide web interface for remote access.

^dSoftware tracks "required dates specific to each caregiver" (probably intended for certs. Without semantic knowledge)

^eSpecifically mentions remote schedule access (for employees), assume if web based can be remote accessed through VPN at the very least

^fCan be recorded (unstructured) in the Comment field

Feature Analysis

Agency Manager

Agency Manager has a very professional website with little real information about the product. Their “Resource Center” is just a glossary of terms... Because of this fact, it is impossible to make any recommendation about the product without getting more information from another source.

Alora

Exec. Summary: Looks good, their description hits on all the high points and essential features.

Most of their marketing puts significant emphasis on user-friendliness, so this is presumably a core aspect of their design (possibly to the detriment of completeness or efficient use). Support for validation of OASIS Assessments against schedules (and includes this information in claims).

They provide demos, so perhaps it would be worth getting one.

Ankota

Exec. Summary: If you are just looking for scheduling software, this is probably the best choice.

Composed of the following modules: Scheduling, Nursing, Telephony, Mobile Software

The scheduling software does just what you would think, and appears to do it well. When scheduling, it takes into account geography for minimizing trip times, continuity of care for scheduling the same nurse with the same client, variable time windows for scheduling, client availability, employee skills and client needs, and options for choosing the "best" schedule from available choices.

CareAnywhere

Exec. Summary: Looks very good. Some gaps in information (e.g. payroll)

Very professional website, looks like quality and well-supported software. Has a nice self-scheduling feature to allow employees to schedule themselves (and set availability) and to view client schedules also to match employees and patients based on user-defined preferences. Focus on "billing by exception" system to eliminate as much work for "normal" claims as possible. Includes a Physician Portal for approvals, signatures, and viewing client information. Has a custom report writer feature that could be useful for making your own reports.

Report customization includes a “custom report writer”. Although I am not sure exactly what this means, it does suggest the ability to create custom reports significantly different than the built-in reports.

CareVoyant Home Care

Exec. Summary: Very professional, great features, if price is reasonable, highly recommended.

Composed of the following modules: Preadmission, Intake/Admission, Authorization, Scheduling, Clinical, Hospice, Billing/AR, Electronic Remittance, Collections, Reporting, Document Management, Dashboard, Physician Portal, OASIS Analyzer, Business Solutions Integration.

Includes Active Directory integration of login data which would allow for single-sign-on as office staff increases, very useful. Has "OASIS Analyzer" that checks scheduled assignments against HHRG coding. I'm not sure what that means, but I assume it is useful

Also includes a document management module which has a lot of nice electronic document management features for use with scanned or native electronic docs (including categorization, searching, and attaching to patient records).

Includes report customization using Crystal Reports or Microsoft SQL reporting (ReportViewer). With these tools you can create completely customized reports about any data stored in the database. They both require some technical experience to use, but we are familiar with the Microsoft SQL reporting and could write custom reports for you.

Client Services Manager/Personal Care Services

States that source code is available, this could be a nice solution to prevent being tied to the company for support and extension (although it may require additional cost to acquire). Double-password is lame. Lots of flexibility for defining a workflow, programs, products and services, rules, terms, etc. but probably a lot of setup work to do it. Includes user messaging feature. Features for verifying hours against schedules. Billing system may be inflexible about defining price/service (or require individual adjustment, often). Includes neat features for tracking printed forms (bar codes, versioning, etc.)

Makes use of Google Maps for displaying client locations

Encore® Financials

Delta Health Technologies, LLC [<http://www.deltahealthtech.com>] provides a suite of software packages targeted at home health care under the Encore® name. The Financials package is probably the most appropriate for your business. The brief description includes a scheduling feature with a novel way of searching for available employees to match a patient time that may be useful.

Generations

Exec. Summary: Doesn't fit your business, ignore.

Although their website lacks specific details, it appears that their system (as a whole, if required to buy it as a whole) includes outsourcing of operations as well as a software system.

The motivation for the software appears quite good, the selling points are valid, but I am unable to determine what exactly the software does. The QuickBooks interoperability is a good selling point, since you get a standard billing/reconciliation/invoicing system which you are already familiar with. But there is nothing to go on in determining whether or not to consider the product.

Designed to work with QuickBooks for financial management functions, rather than implement the functions in the program.

Harmony Health Care Management System

Composed of the following modules: Census Management, Billing, Accounts Receivable, General Ledger, Accounts Payable, Purchasing and Inventory, Care Planning, Physician's Orders.

Typically sold as a software suite, which includes a set of modules, but individual modules can also be purchased. Includes the ability to define a custom coding structure for efficiency.

The purchasing, inventory, and accounts payable features are not common among the other systems.

HealthMEDX Vision

Exec. Summary: Hard to evaluate suitability, probably not worth further investigation.

The descriptions of the product all speak in general terms. It hits most of the high points for requirements of a home health software system, but nothing stands out beyond the basics. Has a more advanced Customer Relationship Management system than most of the other options with features for tracking marketing activities, leads, sales, and referral sources. Has an

"automatic" staff-matching feature based on physician orders. Mentions "online" maps for patient locations and directions (not sure which service).

HomeCare Billing Solution

Exec. Summary: OK, not great, possibly good on cost, but no way to know.

Contrary to its name, HBS provides more than just billing - it is a complete solution, as with the other products in this comparison. It is marketed as "The Affordable Alternative", which suggests an emphasis on cost over features.

Workflow for scheduling includes setting status of a visit "scheduled", "verified", "billed", etc. which can be used for reconciling employee time sheets with the scheduled appointments

Also includes integration with a medicine database to check interactions, side effects, and teaching sheets

No information about the interface or how it is used.

HomecareNet

Exec. Summary: Not a lot of information to go on.

Includes a messaging system for employees to communicate about information in the system (e.g. notices about events and updates to information). Supports multiple payers and split billing.

Home Health Informatics

Too little information to make any recommendation.

HomeSolutions.NET

Exec. Summary: More targeted at point-of-care integration, not likely best solution for office-only scenarios.

The quality seems reasonable, but there are very large gaps in the feature marketing that are a cause for concern. There is very little discussion of what client and employee information is tracked and how the system is used. There are also few, if any, stand-out features. Website is not well designed or maintained, which speaks poorly for the product. A personalized web demo is available at <http://www.sansio.com/OnlineDemo.asp>

HomeRun

Appears limited and undersupported. Suggest avoiding this software.

HomeTrak

Consists of the following modules: Referral, Client, Caregiver, Schedule, Payroll, Billing, Report.

Includes features for tracking new clients and optimizing the process of handling referrals and new clients (and converting potential clients to actual clients). Also mentions information auditing features to see what information was changed when and by whom. As well as matching clients to caregivers based on skills and user-defined parameters.

Doesn't mention moving schedules to payroll, which is worrisome. Also doesn't show any billing or A/R reports in the reports list, which is concerning.

Site lists that it works with the following programs: QuickBooks, Peachtree, Google Earth, ADP, Paychex, ACT!, Ezclaim, GenerationsUnite, and RemCare.

Maestro

The software treats every action as a "task" to be completed and provides automatic selection of tasks based on the "status" of a patient, schedule, etc. It sounds like a complete pain to use. Recommend avoiding it.

Works with well@home <<http://www.wellathome.com>> system for telehealth.

myhomecarebiz.com

It looks like a very promising, very professional, program. Missing lots of details for what the software does. Almost no information on how the software is used or what specific information it stores. Does have a nice system for tracking patient issues, based on prioritization with updates to each issue as the status changes. Without more details about how it works and what information it stores, there is no good way to evaluate its suitability.

Interoperates with QuickBooks and Peachtree.

Service Agency Manager (SAM)

Exec. Summary: Very good, very thorough in stored information, interface a little cryptic/intimidating. Best of the lower-priced options.

The user manual for the software is available on their website, which makes this evaluation infinitely more thorough than any of the others.

The interface is a bit dated, highly reminiscent of the Windows 3.1 interfaces of the early 90s. The program is limited to Windows. Allows customization of attributes and skills which can be applied to clients/employees. Holds information for clients, employees, payers. Can track employee certification items/dates also tracks employee and client availability. Handles scheduling of employees with clients (view calendars by both). Has a schedule verification function (can view all visits for a week and check "verified" for each), the interface appears a little slow (must edit each visit and approve/deny), but it is very useful/functional (can be done by client or employee). Also includes ability to compliance- check schedules against client requirements. Can define plan of care and OASIS assessment for each patient. Has the ability to calculate billing rates by Agency, Employee, Client, and Payer (can set for each and program will set rate based on specificity). Has good reporting features, not pretty but informative.

Soneto

Although there is a significant lack of substantial information on their website, the software appears to be relatively well designed and supported. Includes features for "creating unique tabs and fields". Includes several payer billing capabilities (split, copay, daily benefit). Also has nice smart-client features for working online or offline based on connectivity.

Can use MapPoint, MapQuest, and/or Google Maps for viewing client location information.

Visit Wizard

Their website is so packed with stock photography of people that it actually detracts from their product... They include different purchasing options (which they describe as rent, lease, or buy). The modules for home care are Scheduling, Invoicing, Medical Billing, and Payroll which are all likely applicable to your business.

Lots of integration with their telephony system. Includes remote monitoring to check in on status remotely. Can record messages, late arrival notification.

VisiTrack

Exec. Summary: Features are well documented, appears to be a solid program. One of the best of the desktop applications.

Nice Quality Assurance tools for checking for problems. They have a very thorough features list at <http://www.visitrack.us/features.html> which should be useful in determining the suitability of the software for your purposes. They have a very extensive list of built-in reports. The interface is a bit spartan, but functional.

Recommendation

If interested in just scheduling, investigate Ankota. If looking for lower-cost solutions, SAM or Visitrack. If looking for the best overall system CareVoyant, otherwise CareAnywhere.

Weblog Software

Desired Functionality

The intended use of the weblog (blog) software is for the office staff to be able to post notices to all employees about administrative updates, events, and any other general information distribution. The key features that motivated our search were ease of use, ease of administration, and a simple facility for sending email notifications when a new post is created to inform all employees that there is new information available on the weblog.

Available Software

Table 6. Available Software

| Rating | Name | Website |
|----------------|-------------|---|
| ★★★★★ | Blogger | https://www.blogger.com/start |
| ★ ^a | Google Wave | http://www.wave.google.com/wave |
| ★★★★ | Serendipity | http://www.s9y.org/ |
| ★★★★ | TextPattern | http://textpattern.com/ |
| ★★★★ | TypePad | http://www.typepad.com/ |
| ★★★★★★ | WordPress | http://wordpress.org/ |

^aAlthough the software is currently rated at ★, we suspect that the software will merit a full ★★★★★★ when completed. Therefore, if this analysis is reconsidered in the future, we highly recommend checking the status of this product.

Feature Comparison

The software licensing for the software considered falls into one of the following categories:

| | |
|-------------|--|
| BSD | A free software license originally used for the Berkeley Software Distribution. This license allows the user to use, modify, and redistribute with very few restrictions. |
| Free | Freeware is software which doesn't require purchase, but which rarely includes the program source code required to make modifications and rarely includes the ability to redistribute the software. |
| GPL | The GNU General Public License is a free software license created and promoted by the GNU Foundation. It allows for use, modification, and redistribution of the software with the condition that derivative works of the software must be distributed with the source code for the program. |
| Proprietary | Proprietary licensing gives you the right to use the software for the purposes covered in the license once the requisite fee has been paid to the licensor. |

For the purposes described above, the only important distinction is that BSD and GPL software can be freely modified to suit your needs without restriction while Free and Proprietary software can not. This is not likely a significant concern in the near-term, since the standard features of any of these software packages should be more than adequate.

Table 7. Feature Matrix

| | Pricing | Ease of Use | Ease of Admin | Ease of Install | Licensing | File Attach | Hosting | Email | Private |
|--------------|---------------------------------|--------------------|----------------------|------------------------|------------------|--------------------|----------------|-----------------|----------------|
| Blogger | Free | Very Easy | Easy | None | Free | Media | Them | 10 ^a | Yes |
| Google Wave | Free | Med | Easy | None | Free | Yes | Both | Yes | Yes |
| Serendipity | Free | Easy | Easy | Med | BSD | Media | You | Yes | Yes |
| Text Pattern | Free | Med | Med. | Med. | GPL | Yes | You | Plug in | Plug in |
| TypePad | \$8.95-\$90/ mo ^b | Easy | Easy | None | Proprietary | Media | Them | | |
| Word Press | Free | Easy | Easy | Easy | GPL | Yes | You | Plug in | Yes |

^aCan send to at most 10 email addresses

^bBased on storage space and bandwidth usage. For your scenario it would be \$8.95 for the foreseeable future.

Feature Analysis

Blogger

Blogger is Google's blogging service and is also very popular. Blogger is hosted completely by Google and therefore setup and administration are incredibly easy. Blogger has a lot less functionality than WordPress and TypePad but all of the main functionality is there and is super simple to use. They do not allow you to upload files that are not images or videos.

Google Wave

Wave is still testing but it is shaping up to be a very exciting new communication technology. Think of Google Wave as a cross between an IM, an e-mail and a blog post. You invite people to participate in your "Wave" where you can write your message and everyone invited to your Wave will be able to see it. You can allow participants of the wave to add their thoughts or edit the content which is then propagated to everyone else in the wave. You can also add files, maps, videos and pictures to the wave for everyone to see and download. You can even have private conversations with members of the wave that only you and they can see.

Serendipity

We use Serendipity in our office as our blogging software. Serendipity isn't quite as pretty as WordPress or TypePad but it gets the job done. Serendipity also has one of the easiest plug-in systems that I have seen. One concern for you specifically is that Serendipity will only block access to posts based on category assignment and there is no way to set default categories.

What this means to you is that if you forget to set a category when you are creating your posts everyone will be able to see the post.

TextPattern

TextPattern is another self-hosted blogging service like WordPress. TextPattern has seen less adoption than WordPress and subsequently there are fewer plug-ins or extensibility options. There are a couple of features that set TextPattern apart, however. First is Textile which allows users not familiar with HTML to format their blog entries a little easier. The second is their sectioning tool which provides for a better way to segment posts than the standard category classification.

TypePad

TypePad is a pay-for blogging service. All files are hosted on their servers. The software is fairly feature rich and appears to be easy to use on all levels. Pricing is monthly and the lowest service level would probably work fine for what you need (\$8.95 per month). It is unclear whether or not they allow you to block posts or send e-mail notifications. They do have RSS functionality so notifications of blog posts would be relatively easy to work out if they do not have e-mail built in.

WordPress

WordPress is very popular free blogging software. There are thousands of extensions that allow you to add nearly any kind of functionality you would like. However, due to the wide ranging appeal of the program and its greater number of features, WordPress may be slightly more complicated to use than the other, less feature rich programs.

Recommendation

There are hundreds of blogging platforms available all with their own little quirks and niceties but for the most part they are all fairly similar. I chose to review some of the more popular products as they tend to have more active development and a much larger user base contributing add-ons and extensions. Of the blogs I reviewed my overall recommendation goes to WordPress. WordPress is free, easy to use and immensely popular. There are plug-ins for almost every conceivable feature addition you could ever want and it meets all of your requirements. Frankly you probably wouldn't go wrong choosing any of the more popular blogging programs but in my opinion the best of the best is probably WordPress.