CUSP Services presentation

Agenda:

Background on CUSP

Functionality covered

Software selection process and a high level walk through the system

Our process

Next steps

Who we are

SME's
- Credibility and experience
- Core staff
- NDIA knowledge
- Focus / growth
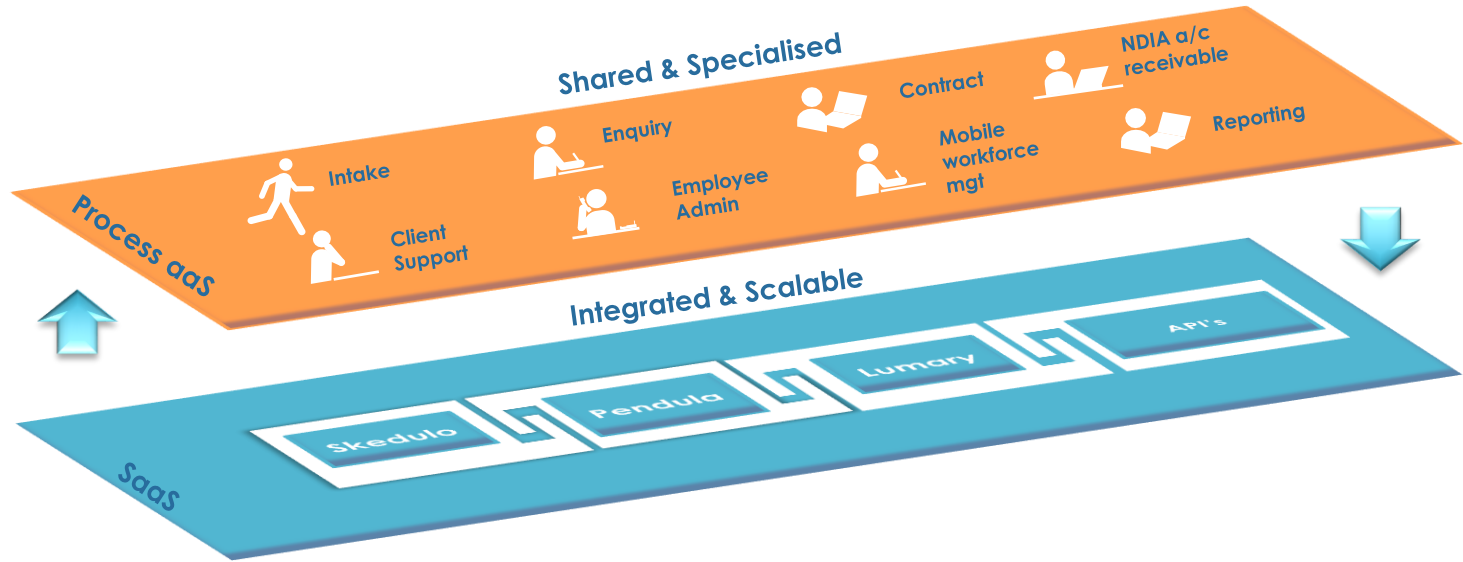- Sector view

4thought
- Program mgt
- Implementations
- Organisational change
- Business process
- BPaaS know-how

ConnectingUp
- Technology skills
- Industry visibility
- Core skills
- Partnering - vendors
- Marketing

Business Process as a Service

Why?

"It can feel like overwhelming complexity everywhere you look in NDIS transition.

Working with CUSP has allowed us to focus our energies on the other challenges"

We eliminate a great deal of risk – we have already developed the business processes, we have the system in place, we have an experienced team and we are providing this service to customers now.

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We have been through the detailed process of evaluation and chosen the right combination of software. The technology has a long term future.

Multiple customers helps provide scale, licence benefits and applied learning

Savings come in both administration and in operations.

We let you concentrate on your core business while we concentrate on ours.

What services do we offer?

Enquiry and Intake
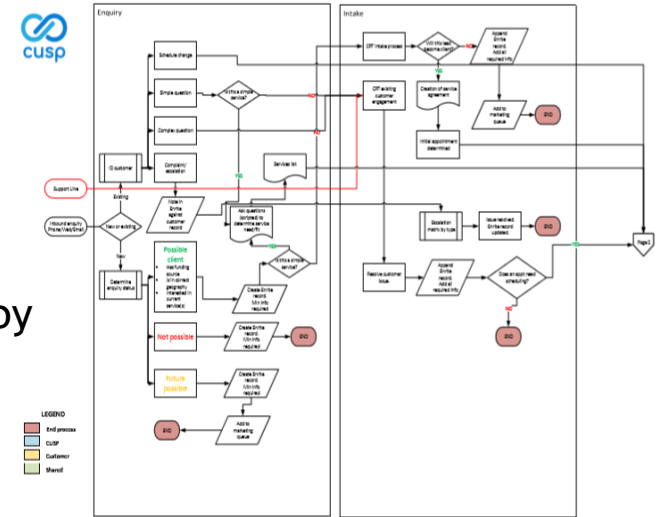
Monitor new and existing customer channels

Manage the phone queue.

Capture sufficient information

Initial qualification of customers – questions dictated by business rules to see if they are suitable, such as:
- NDIA / other funding sources.
- Family relationships
- Key contact person
- 3rd party medical contacts
- Special information needed – safety concerns / risks

Service Contract management

This start the NDIS service agreement process. Create the unique identifier.

Allocate to a support coordinator / team leader. Update service agreement with service description / goals / tasks.

Manage the time to respond. Help ensure a timely registration and commencement of services.

Ensure accurate mapping to NDIA service items. Maintain a changing set of service items over time.

Scheduling

Mobile workforce management. Allocation of tasks, reallocation as needed, data input for timesheeting, WH&S management and reporting, maintenance of recording of staff accreditation.

Allocation of associated resources, including vehicles and equipment. Sign in and sign out as needed.

Onboarding of new staff. Reallocation of software licences. [Provision of nominated equipment, BYOD etc] Initial training and ongoing support in the use of the systems.

Accounts Receivable

Bulk upload of transactions to NDIA and other funding bodies.

Get remittance advice from NDIA portal

Reconcile total amount on bulk upload file versus what went into the bank account, identify errors. Minimise and manage exceptions.

Manage other revenue sources as needed. eg state government, self managed, privately funded, billed.

Reporting

Standardised reports, eg:

- NDIS service agreements expiring in the next 90 days
- Jobs cancelled last month
- Participants without an active NDIS plan (target list)
- Service agreement status and balances
- Services delivered by worker last month (utilisation)
- Scheduled activities last month / Delivered activities last month
- Jobs not accepted / completed
- Data integrity reporting

Software selection and business processes

We started with a deep dive on functionality

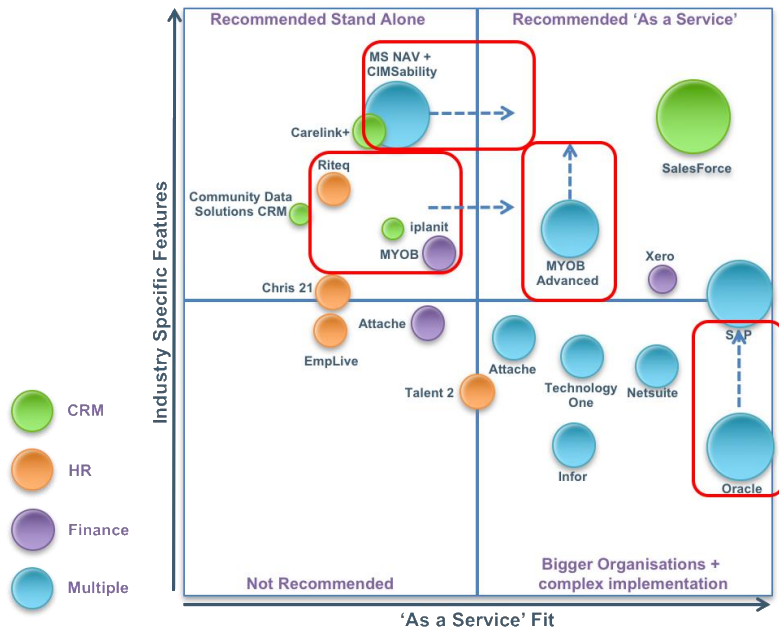| Functional Tower	CRM	Schedule & Rostering	HR	Awards Interpretation	Payroll	Finance
Primary Solution	• The CareRite app by Enrite runs on Salesforce and takes full advantage of the underlying Salesforce capabilities. • It has strong CRM capabilities and can be extended by configuration.	• Good functional coverage, aligned to the needs of a services based care market. • Runs on Salesforce and is pre-integrated with CareRite e.g. the field worker mobile app integrates to CareRite to record case notes.	• Good basic coverage across core capabilities with the exception of learning management • They integrate to external LMS products to cover this. • Technology One advised that they are investing in their HR capabilities.	• KeyPay is a partner solution that has integrated with Skedulo in a number of implementations. • It offers award interpretation that feeds into the scheduling software enabling cost driven scheduling.	• Technology One has good coverage of the payroll requirements built into it's core SaaS platform.	• Technology One's core is a strong finance solution as a SaaS offering which meets the requirements.

Surveyed 137 Service Providers, mapped current usage, upcoming needs and what platforms they were using.
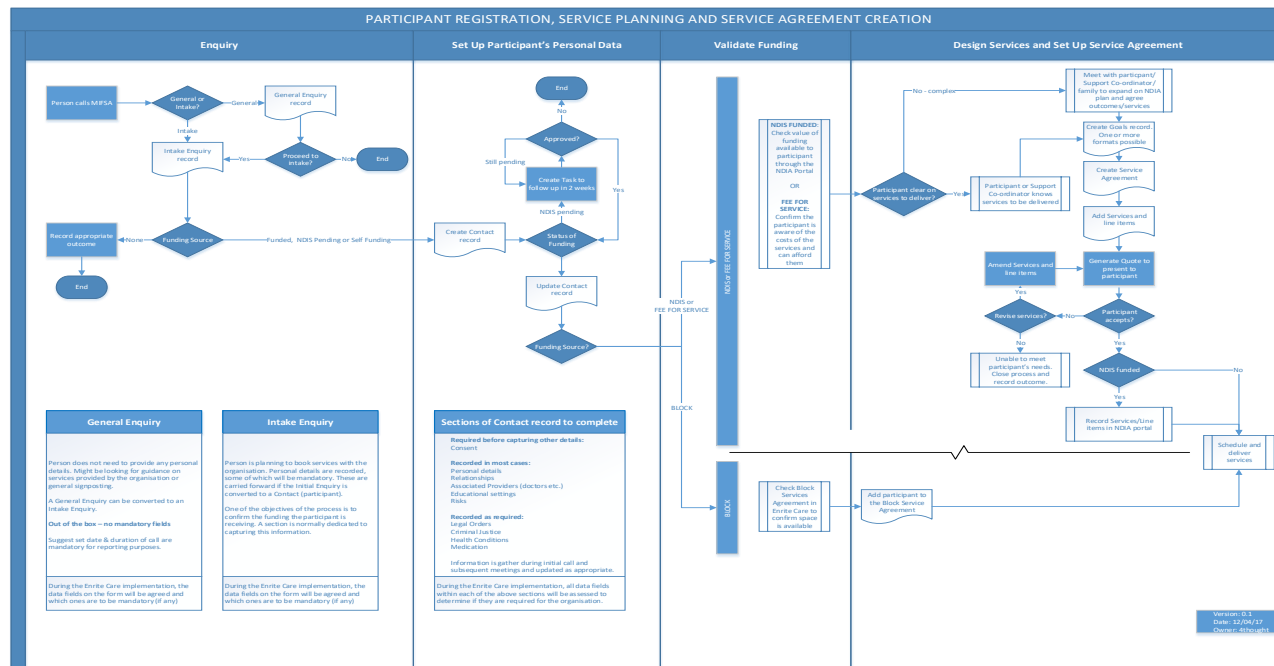
Built out functional and non-functional requirements.

Assessed the market options

Key criteria:

- SaaS (cloud based)
- Functional coverage
- Sector usage
- Cost
- Ongoing development potential

Built out the business processes

Validate as suitable.

Map to roles.

Specialist functions – ie higher order rostering

High level walk through the system

Key steps within the system
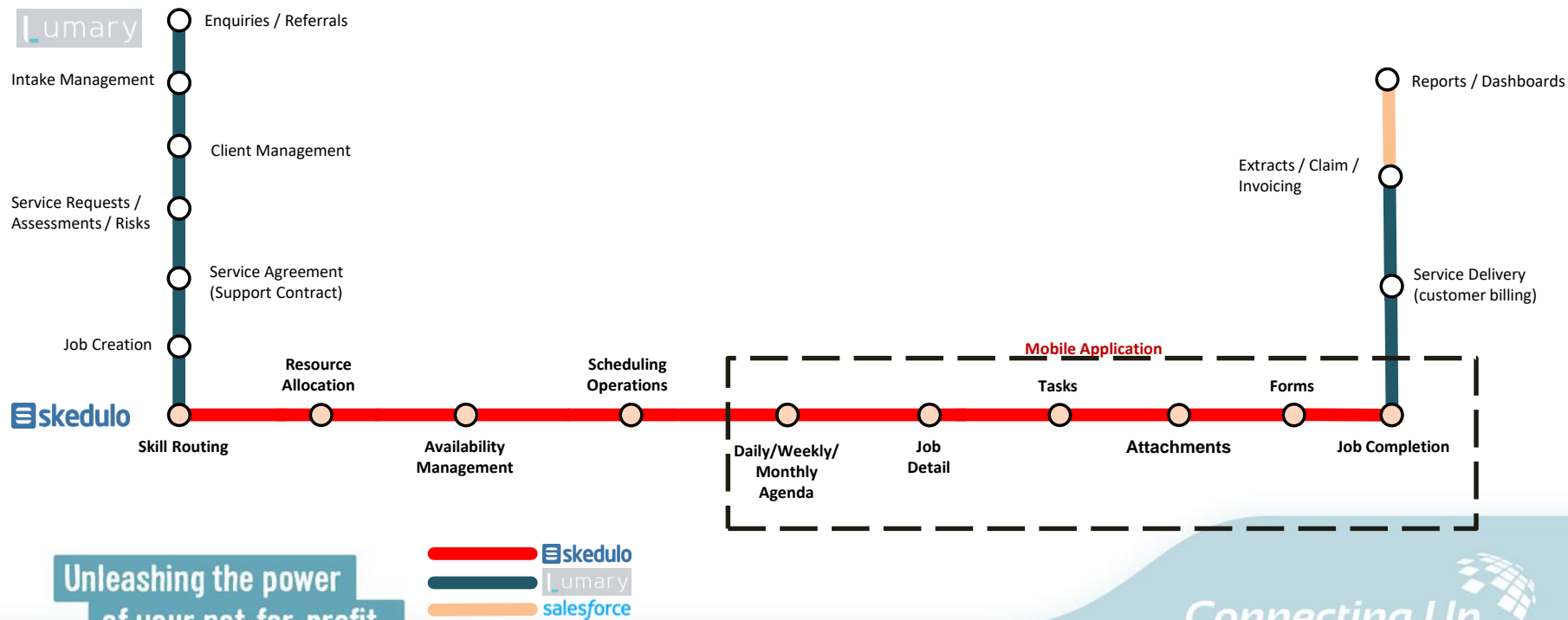
Create New...   ▼

Recent Items

- SA-00000003
- JA-95
- JOB-0079
- JOB-0084
- JA-105
- Mary Jones
- 00001026
- JOB-0083
- A-002
- A-001

Recycle Bin

Service Agreement
SA-00000003

Customize Page | Edit Layout | Printable View | Help for this Page ❓

Services Delivered [5+] | Plans [0] | Open Activities [0] | Activity History [0] | Notes and Attachments [0] | Jobs [5] | Classroom Contacts [0]

Service Agreement Detail

[Edit] [Book Appointment]

Service Agreement Name	SA-00000003	Status	Current
Funding Type	NDIS	Start Date	1/07/2016
Client	Mary Jones	End Date	31/07/2018
NDIA Contract Number		Rollover Date	
Notes		Quote Valid Until	6/07/2016

▼ Financial Details

Contract Total	$10,072.50	Total Cancellations	
Total Delivered	$1,296.63		
Remaining Balance	$8,775.87		

▼ NDIS Information

Funding Management	Participant
Funding Manager	
Participant Nominee	

▼ Service Agreement Items

Type	Site	Service	Rate	Quantity	Total	Lead Provider	Delivery Location	Delivered
Flexible	Aspect Northern NSW	individual counselling	1/1/2016 - 1/01/2020 $144.07	50 hours	$7,203.50		Registered Site	$0.00
Flexible	Aspect Northern NSW	specialised group early childhood interventions	1/1/2016 - 1/01/2020 $57.38	50 hours	$2,869.00		Registered Site	$0.00

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Connecting Up

Screen 1 (left):

●●○○○ Optus 📶   2:29 PM   75% 🔋

JOB-0085

In Progress

Actions

CONTACT DETAILS

Contact	Mary Jones ›
Account	Jones Household ›
Phone	992342343
Email	maryasd@hotmail.comm

OTHER DETAILS

Service Agreement	SA-00000003
Service Name	individual counciling
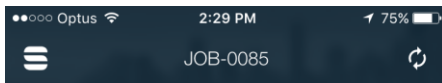
Screen 2 (middle):

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JOB-0085

OTHER DETAILS

Service Agreement	SA-00000003
Service Name	individual counciling

Related Service Item
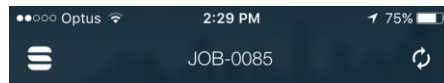Goals

Provide Mary with support in day-to-day activities around the house

Funding Type	NDIS

Alerts

Beware of dog on residence

Screen 3 (right):

●●○○○ Optus 📶   2:29 PM   75% 🔋

JOB-0085

Case Notes

Billable	✓
Petty Cash Allowance	25

Support Needs

Administer Medication
Epileptic

RELATED

Resources	›

Tailored reporting

Includes the indicators needed to manage in the changed environment

Strategy / growth plans

Transition planning

We have implemented this solution multiple times
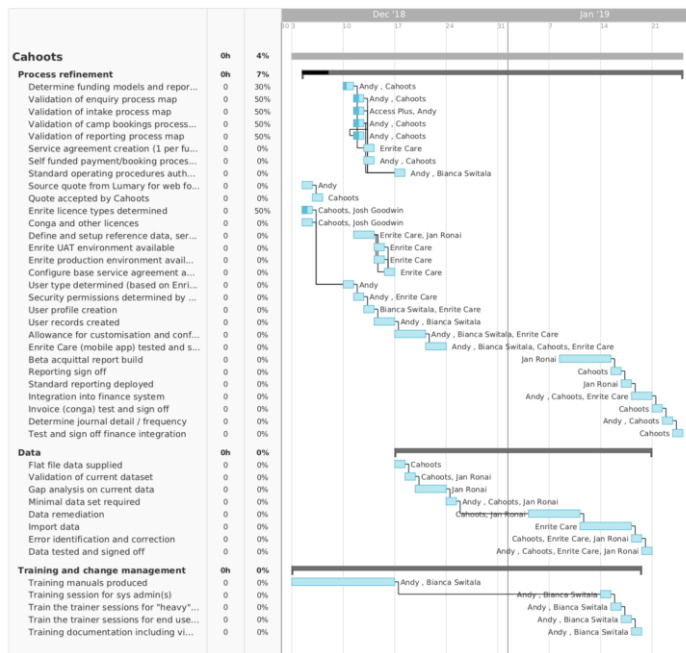
Transitions can be a high risk undertaking and often end up failing or only partially done.

Key areas to address:
- Organisational change
- Business process refinement
- Data conversion
- Role redefinition
- Governance / Project management
- Training

Administrative and operational benefits

eg. High level indication of benefits

Personnel impact	Baseline	Annual savings	Necessary investments	
Timesheets – online systems, validation activity including geolocation, reduce overpayments, ensure that staff are on site as expected, avoid special payruns		xx FTE's	Training of the staff. Change the terms of employment to have a smart phone.	Incl in transition
Ability to track participants remaining funds				
Incident reporting: better case notes, streamlined process using predefined picklist, ability to collate information easily (Ombudsman example).				
Extensive reporting				
NDIA portal reconciliation. Reduced exceptions and payment errors. Improved cashflow due to daily claims				

eg. High level indication of benefits

Personnel impact	Baseline	Annual savings	Necessary investments	
NDIA bulk load and invoicing		xx FTE		xx FTE
Simplification and				
Groups functionality				
Ability to match customer and employee data				
Scheduling and rostering. Single source of truth. Includes onboarding of customers, employees and services				
Extensive reporting				

Summarised in a ROI evaluation

ROI EVALUATION			Date:	13/3/19	Savings % A xx BBC				CUSP

Proposal No:	Proposal Type:		Proposal Title					End Products Impacted (ref#)	
1	xx			**Establish a BPaaS offering**				**2,3,4,5,6**	
Proposal:	There are substantial consolidation, automation and efficiency savings to be gained by identifying, centralising and eliminating duplication This includes Client data mgt (Enquiry, Intake) Service management (Service contract management) Case management (Case notes, incident management) Scheduling / rostering NDIA interface Reporting Employee data								

	Outside	Value	Baseline	Annual Savings	Necessary Investments			Other positive impacts/benefits	
	CUSP	Added							
	Bounds	Idea	FTE's	FTE's	Code	Description	A,B &C	✓☒	
Personnel impact (manyears)	Timesheets								Transition costs are for 3 sites and assume xxx
	Ability to track remaining funds								project resources are supplied
	Extensive reporting								
	NDIA payment reconciliation								
	Standardised business processes								
	Consistent naming conventions								
	Match customer and employee								
	Structured access								
	Total			0.00	**CUSP FTE's**		0.00		Other negative impacts
Financial Impact ($"000)	Timesheets			0	CUSP service cost (per annum)				xxx would need to consolidate at least 4 roles
	Ability to track remaining funds			0	Software costs (per annum)				
	Extensive reporting			0	Transition costs (once off)				
	NDIA payment reconciliation			0					
	Standardised business processes			0					
	Consistent naming conventions			0					
	Match customer and employee			0					
	Structured access			0					
	Total		0.00	0	Total		0		
					Payback (years)		#DIV/0!		

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Summary

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Questions / Comments / Next steps?

Contact details:

Rod Paine
rod@cusponline.com.au
0407 513 163