
CUSP Services presentation

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Who is CUSP?

What are we providing?

Why?

Who we are

SME's

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

4thought

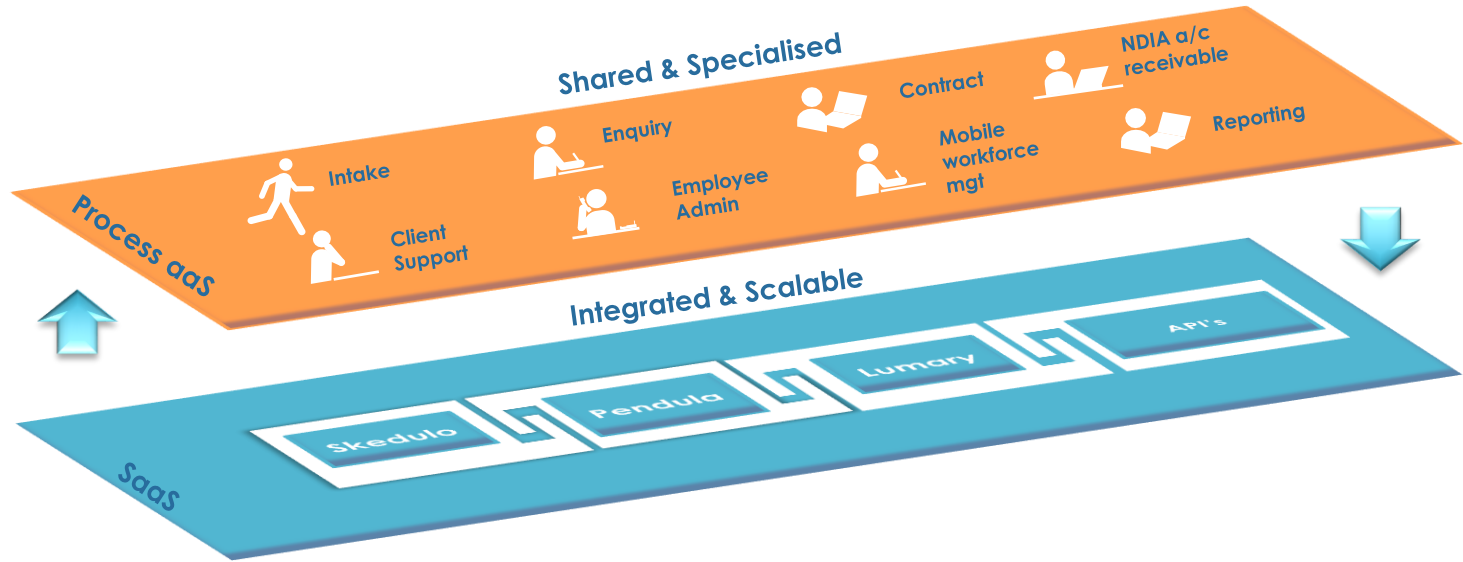
- Program mgt
- Implementations
- Organisational change
- Business process
- BPaaS know-how

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

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Business Process as a Service



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Why? *The NDIA payment rate assumes a very efficient org.*



Table 1 Transitional cost model

	Assistance self-care – individual		Community support – individual	
	Standard	High intensity	Standard	High intensity
Drivers				
SACS	SACS 2.3	SACS 2.3	SACS 2.3	SACS 2.3
Direct salary	\$21.30	\$21.30	\$21.30	\$21.30
Client-facing time inc leave	85%	80%	80%	76%
Client-facing time exc leave	95%	90%	90%	85%
Supervision – span of control	1:15	1:15	1:15	1:15
Corporate overhead	15%	15%	15%	15%
Return on capital (margin)	5%	5%	5%	5%
Key costs				
Salary costs including client-facing time	\$22.56	\$23.96	\$23.96	\$25.52
On-costs	\$8.76	\$9.11	\$9.10	\$9.44
Corporate overhead	\$5.53	\$5.53	\$5.83	\$5.83
Return on capital (margin)	\$1.93	\$2.02	\$2.05	\$2.15
Total per hour price	\$38.78	\$40.62	\$40.94	\$42.94

While this is only the direct rate, it accounts for 60% of NDIA spend.

They have assumed a set of very efficient organisations.

Typically backoffice costs are estimated to be more like 28% of turnover.

22% is as low as we have found to date.

Limited time available to get the required efficiencies.

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Why? *Continued...*

“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”

Functionality, software selection and decision criteria

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We started with a deep dive on functionality

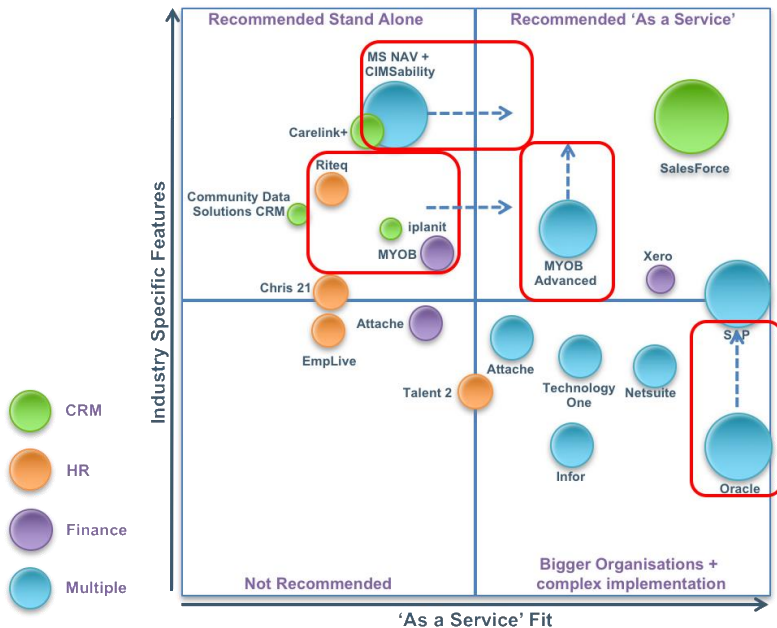


Surveyed 137 Service Providers, mapped current usage, upcoming needs and what platforms they were using.

Functional Tower	CRM	Schedule & Rostering	HR	Awards Interpretation	Payroll	Finance
Primary Solution	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> KeyPay is a partner solution that has integrated with Sledulo in a number of implementations. It offers award interpretation that feeds into the scheduling software enabling cost driven scheduling. 	<ul style="list-style-type: none"> Technology One has good coverage of the payroll requirements built into its core SaaS platform. 	<ul style="list-style-type: none"> Technology One's core is a strong finance solution as a SaaS offering which meets the requirements.

Built out functional and non-functional requirements.

Assessed the market options



Key criteria:

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

What services do we offer?

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Enquiry and Intake

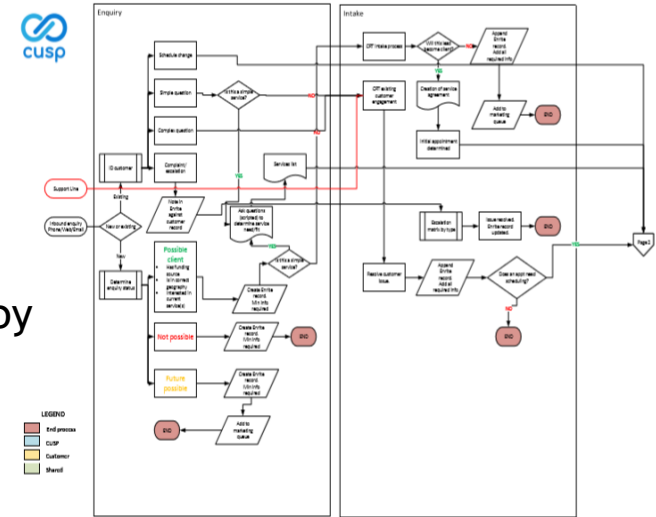
Monitor new and existing customer channels

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



Enquiry and Intake - real world benefits

GP's reception is the analogy.

CUSP will never make assessments, determine treatments or sign a contract, however the bulk of contact are simple transactions that don't need that level of engagement. eg. reschedule an appointment, check on status of funding application, create a new service booking under an existing line item, enter details into the system...

Simple enquiries are dealt with. Complex enquiries are automatically routed to skilled practitioners within the customer.

This approach will reserve more expensive resources time to focus on key problems, but it also allows ensures we can track the history of engagement, objectively establish the commitments that have been made, and do this consistently.

Service Agreement management

This starts the NDIS Service Agreement process. Create the unique identifier.

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

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.



Service Agreement management - real world benefits

Service agreement line items are carefully mapped to NDIA service items. CUSP continues to update / map them as they change.

NDIS provides contracts that are heavily weighted towards the participant. This means consistency and accuracy of contracts is critical. We work with the service provider to limit the options to those that are approved by the service provider and permitted by the funding bodies. This minimises unintentional variations.

Correctly structured service agreements, associated line items and active monitoring of performance improves delivery performance over time. "If you can't measure it, you can't improve it"



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.



Scheduling - real world benefits

An intuitive system, backed by effective training gives both the worker and the scheduler the ability to look at the calendar and immediately understand availability.

- On line, real time, with phone backup for more difficult situations.
- Capable of dealing with adjustments and last minute changes.
- Less time waiting, negotiating and / or back in the office.
- Less time ringing around and waiting for an answer.
- Gradually eliminate excuses and exceptions.
- WHS compliance; monitoring check ins and outs

Least cost routing and (working on) automated claiming for travel.

Complete case notes and / or verifying delivery of the service real time and within the billable timeframe.

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.



Accounts Receivable - real world benefits

The NDIA approach to plans has been variable at best. Items change without notice. Plans are terminated and renewed without notice. There isn't notification of who is resolving issues.

Having experience of these issues as they arise across multiple service providers dramatically reduces the time taken to investigate, analyse and resolve issues.

Having experienced folk with the right tools also reduces the likelihood of systems errors.



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



Reporting - real world benefits

Salesforce is a very powerful reporting tool and provides an ability to interrogate the data to get real insights.

In many cases this can be bundled into standard reports, which we continue to build out. There is also the ability to quickly and effectively generate reports in support of audits, grant submissions, presentations and the like.

Learning how to use the system well takes some time. Centralising that means each service provider is not paying for training and time spent experimenting with the system.

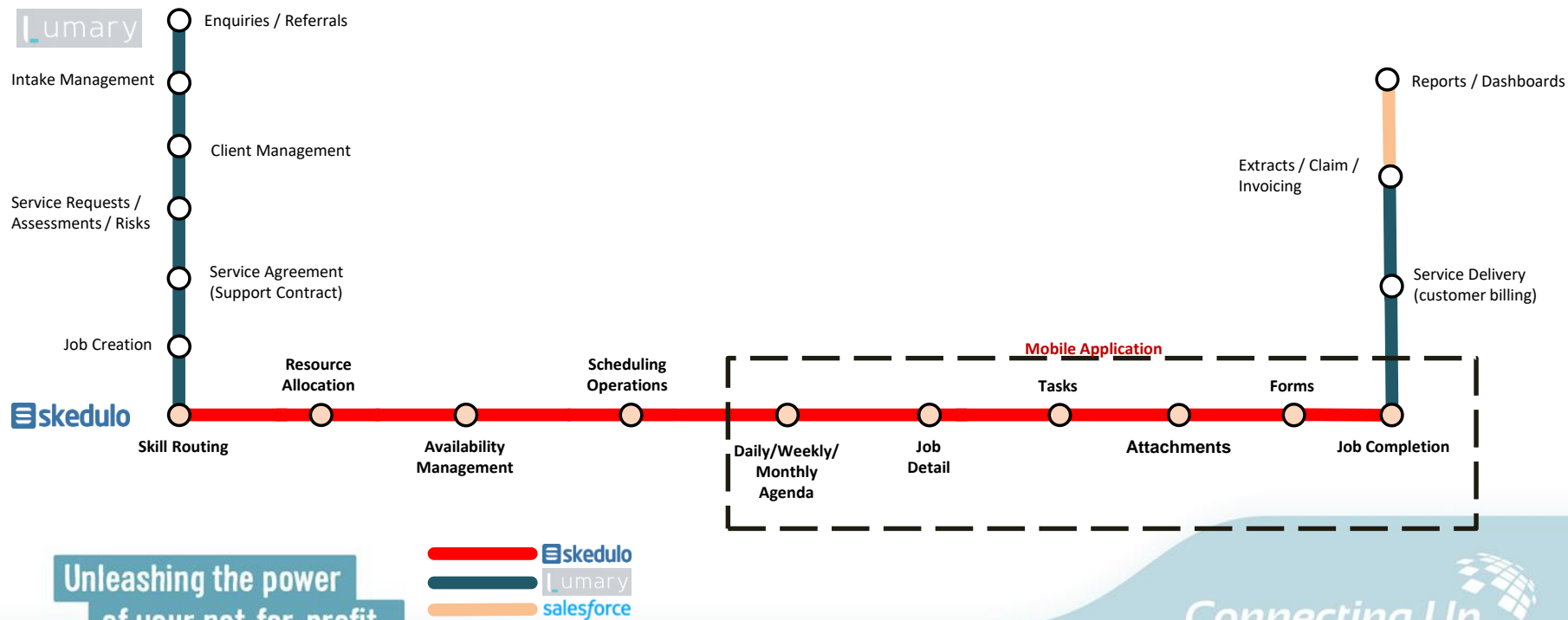


High level walk through the system

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Key steps within the system













Create New... ▾

 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 \[0\]](#)

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 Detail

[Edit](#)

[Book Appointment](#)

Service Agreement Name SA-00000003
Funding Type NDIS
Client [Mary Jones](#)
NDIA Contract Number
Notes

Status Current
Start Date  1/07/2016
End Date  31/07/2018
Rollover Date 
Quote Valid Until 6/07/2016

▼ Financial Details

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

Total Cancellations

▼ 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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Dashboard
Scheduling
Jobs
Resources

Create New

Ben Albrecht

1

Resources

Search for users

☒
Show Active

Alex Colvin

Annabel Jones

Ben Albrecht

Joseph Mercorella

Melissa Smith

Ben Albrecht
Support Worker
0402626946
bena@xebra.com.au
1091 Mt Alexander Rd, Essendon North, Victoria, AUS

Personal
Attributes
Jobs
Availability
Schedule
Map

Resource Attributes

Physical Therapy

Epilepsy Management

Personal Care

Qualified Counselor

Male

Working With Children

Attribute	Expiry Date
Physical Therapy	<input type="text"/> Select Date
Epilepsy Management	<input type="text"/> Select Date
Personal Care	<input type="text"/> Select Date

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Dashboard
Scheduling
Jobs
Resources

Create New
Ben Albrecht

Victoria
Fri, 29th Jul 2016 AEST
Today

Alex Colvin
Support Worker

Annabel Jones
Support Worker

Ben Albrecht
Support Worker

Joseph Mercorella
Support Worker

Melissa Smith
Support Worker

0077 Individual Counselling - Rose Gonzalez

0076 Positive Behavior Support - Tim Barr

0074 Social Support (Home Visit) - John Bond

0079 Individual Counselling - Mar Jones

0072 Social Support (Home Visit) - Jake Llorrac

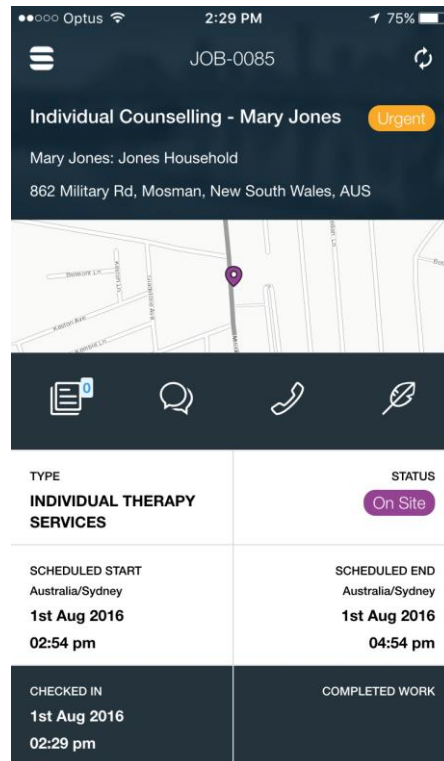
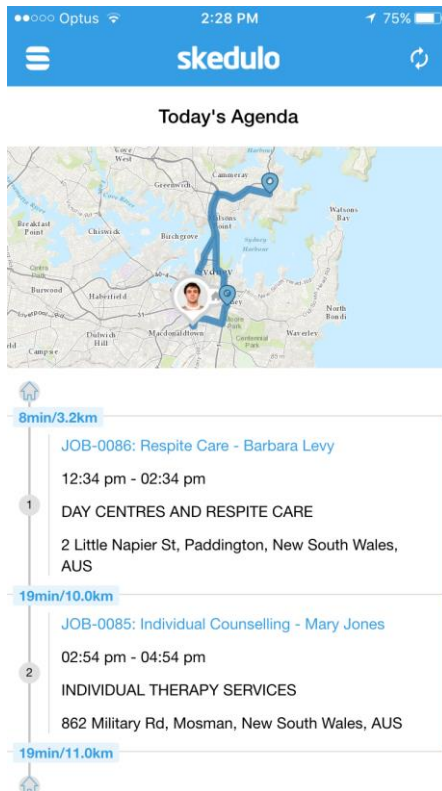
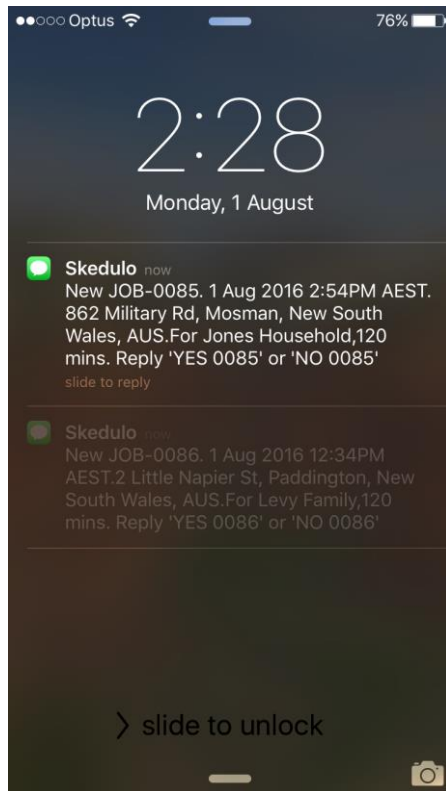
0071 Social Support (Home Visit) - Aaron Song

Day 11
Queued 4
Pending Allocation 0
Pending Dispatch 3
Dispatched 2
Ready 1
En Route 0
On Site 0
More
Extra filters

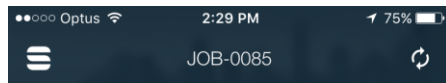
<input type="checkbox"/>	Actions	Job	Account/Contact	Address	Status	Type	Time Constraints	Duration
<input type="checkbox"/>		JOB-0083 Group Booking - Social Activity			Queued	Social Group	No Constraints	180 minutes
<input type="checkbox"/>		JOB-0082 In-Home Care - Tom Ripley	United Oil & Gas, Singapore Tom Ripley	571 Barkly St, Footscray, Victoria, AUS	Queued	In-Home Care	No Constraints	90 minutes
<input type="checkbox"/>		JOB-0081 In-Home Care - Sean Forbes	Mrs. Gonzalez Sean Forbes	2 Treasury Pl, East Melbourne, Victoria, AUS	Queued	In-Home Care	No Constraints	90 minutes

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In Progress

Actions

CONTACT DETAILS

Contact [Mary Jones](#) >

Account [Jones Household](#) >

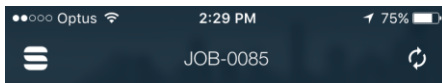
Phone 992342343

Email maryasd@hotmail.comm

OTHER DETAILS

Service Agreement SA-00000003

Service Name individual counseling



OTHER DETAILS

Service Agreement SA-00000003

Service Name individual counseling

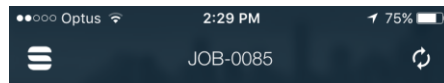
Related Service Item Goals

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

Funding Type NDIS

Alerts

Beware of dog on residence



Case Notes

Billable ☒

Petty Cash Allowance 25

Support Needs

Administer Medication
Epileptic

RELATED

Resources >

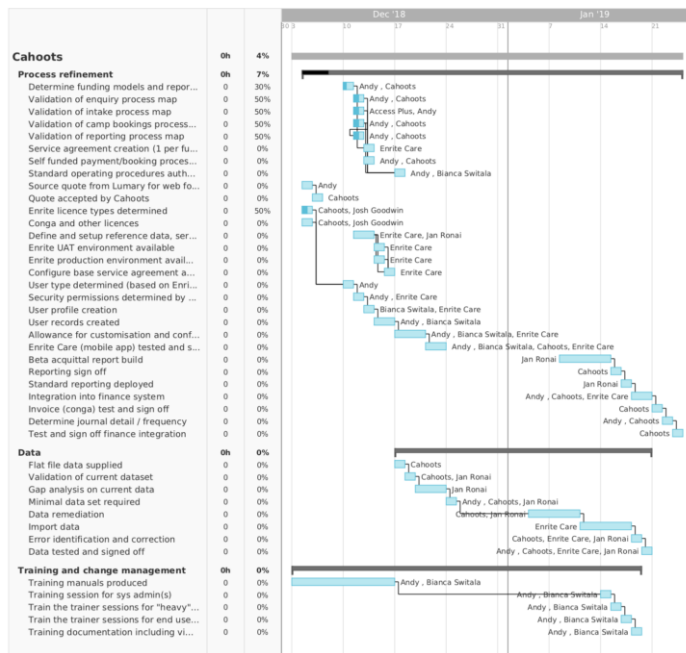
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Transition planning

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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:

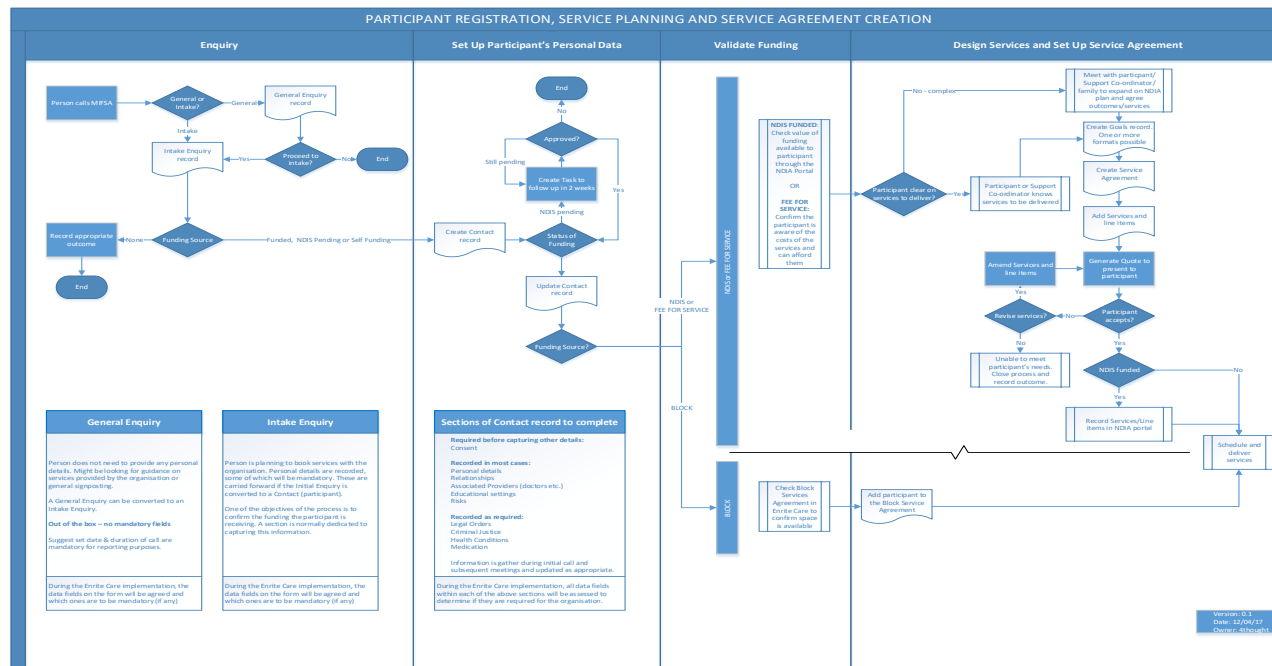
- Organisational readiness
- Organisational change
- Business process refinement
- Data conversion
- Role redefinition
- Governance / Project management
- Training

Our process

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Starts with a check of the suitability



Business processes. Validate as suitable.

Map to roles.

Specialist functions – ie higher order rostering?

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Measure the increased staffing needed

eg. Billing Transactions

Service Provider with 500 clients

CURRENT

4 times a
Year

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manual
process
requires
additional
staff

FUTURE

26,000 times a
Year

Intake

Contract management

NDIA accounts
receivable

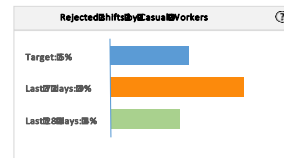
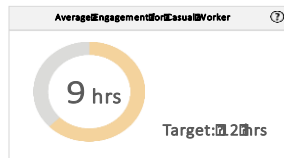
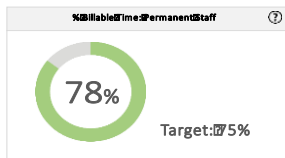
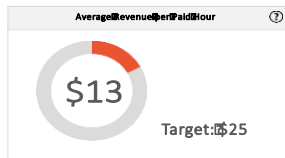
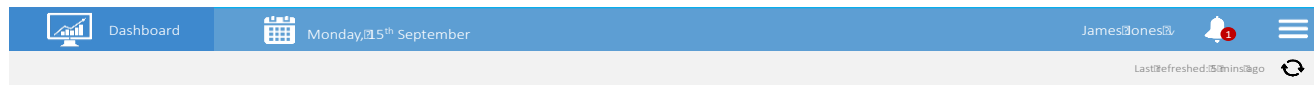
Scheduling

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Step through reporting needs



Average Revenue per Paid Hour by Job Type

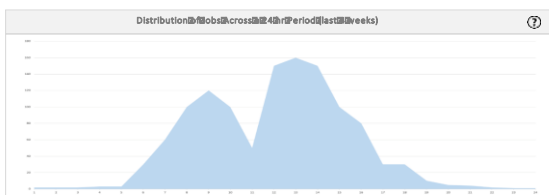
1:1 Support	\$18	●
Respite	\$28	●
Group Programs	\$10	●
Supported Living	\$11	●
Community Based Support	\$15	●

No. of Staff per Team Leader

Name	Today	3mths ago	6mths ago	12mths ago
James Jones	▲ 13	12	12	10
Belinda Long	▼ 14	15	15	11
Janice O'Hara	▲ 15	13	12	10
John Anderson	▲ 15	12	13	11

No. of Clients per Team Leader

Name	Today	3mths ago	6mths ago	12mths ago
James Jones	▲ 120	112	109	95
Belinda Long	▲ 140	135	137	121
Janice O'Hara	▼ 115	123	112	100
John Anderson	▲ 108	92	83	77



Average Job Duration	Average Travel Time	Unfulfilled Jobs
125 minutes	16 minutes	27
No. of jobs completed	% of jobs completed on time	
1,357	85%	

Includes the indicators needed to manage in the changed environment

Strategy / growth plans

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Identify the major cost components

Staff

- Enquiry processing
- Scheduler
- A/R administration
- Reporting
- Vendor management

eg. Took on 3 staff

Software licences

- Lumary
- Skedulo

We have negotiated deals typically reserved for large players

Transition

- Business process mapping
- Organisational change
- Project management
- Implementation

Needs to be fully scoped

Adam Dunkley, GM business operations



“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”

“The clear strategy of CUSP to provide services at an NDIS viable price was critical ongoing. We could tell CUSP realises that with the tight corporate overheads set by the NDIA, their services must sit in a tight price bracket to succeed”

“I’d be happy to take a call from any prospective customer for CUSP to share our experience”

Contact details:

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