



# Check list

We have provided this software checklist as a benchmark or as a basis for comparison.



## 1) Health and welfare focus

Lowering the costs of healthcare is linked to wellbeing and can only be achieved by systems providing a holistic view of a client's health and welfare issues. Conekter provides the means to gather information about all issues relating to a client and presents it in a clear and concise manner for clinician and/or case manager's actions.



## 2) Web based application

In today's information technology dominated world, information must be available anywhere, anytime on any device. This can only be achieved by software systems being totally web based. Apart from the accessibility advantage, the cost of deployment and communication becomes significantly cheaper. It assists an organisation to achieve greater flexibility, client response time and internal efficiencies.



## 3) Holistic view of the client's issues

Conekter provides the means to record all of a client's issues. Clinicians are then able to review and work towards a client's well-being, based upon a complete understanding of the contributing factors.



## 4) Workflows and assessments (rules based engine)

Conekter provides the means for organisations to be able to build their own workflows and assessments and then place them inside the software at the most suitable screen locations. This means that clinicians and case managers just follow the process steps. It provides consistency across all levels of operators, increases worker efficiency and reduces clerical errors. This includes the ability to create an "In Take" system for new clients.

This workflow function also provides the means to customise it based upon a service or fund wherein different questions and fields may be presented. Only the relevant fields would be presented.



### 5) Alerts and reminders

Alerts can be auto generated from an event or trigger or created in an ad hoc manner as day to day reminders. The Follow-up feature is designed to create a more serious reminder based upon an event (child protection warning perhaps) requiring immediate action. These alerts and reminders can be created with a forward action date.



### 6) Client warnings

There are times when a client visit may contain an element of danger to your staff. Conekter gives your organisation the ability to note these dangers or warnings as traffic lights which are highly visible inside the client's record. So, a red light would be set up to indicate a potentially dangerous situation (e.g. beware of the dog on the premises – it is aggressive and will attack strangers).



### 7) Care plans (goals based)

Shared Care Plans are the corner stone of wellbeing. Conekter allows an organisation the ability to use its existing templates or utilise one from your group. The care plan is goal based and contains the ability to give out tasks linked to each goal to any person connected to the client (e.g. could be a neighbour or volunteer). These actions can be given a completion date and then monitored. As an example, perhaps the case worker would like the caring neighbour to call in on the elderly person next door once a day to see if all is well. The software provides the means for that neighbour to email, chat or SMS any concern or perhaps just send an "OK" message.



### 8) Forms, letter, invoice and template builder

Forms Builder is used to create letters, forms and templates which can then be deployed inside the system at the required points (e.g. referral to a GP or agency for servicing). These forms auto populate with the client's data and allow additional information to be added at the time.



### 9) Graphical progress chart for quick review

Each client displays a progress chart in graphical format to give a quick reference point as to the progress on every recorded issue.



### 10) Search function

The Conekter search functions are located throughout the system including a powerful search of words contained within a Note.



### 11) Links all stakeholders to the client

Any person's return to good health or to overcome an issue does not just reside with clinicians. Many other people become involved – family, friends, neighbours, carers, councillors, volunteers. Most are unpaid and unnoticed but each caring and concerned. Conekter allows you to register each person, link them to the client and give them a role but no access to any client data. They can then become an integral part of the case workers' and clinicians' network of helpers.



### 12) Family view

Family, friends, neighbours and carers can be linked to the client thereby providing a 360-degree view of those involved in helping the client to better health and outcomes.



### 13) Configurable and customisable by your staff

Conekter provides the means so that your organisation can take control of the software and configure it to meet your business and operational requirements. Once installed and your administrators trained, they can utilise the extensive toolkit to build workflows, assessments, build reports, add User Definable fields, extract data, create the funding streams and modify the look touch and feel of the system.

It's time for IT to give up control of its software!



### 14) User definable fields

Administrators can create their own fields (User Definable Fields) and place them into the system. These fields can be in any format (e.g. text box, drop down box list) including being made mandatory. They also form part of any reporting requirements.



### 15) Client access (responsibility for own issues)

The software provides an access area for clients where they can become involved in their recovery or rehabilitation program. This may be to review the care plan, chat or SMS to the clinician or perhaps look at the coming appointments. The system allows you to restrict the level and extent of the information they can view.

It also allows you to send messages which could be tailored to their issue (e.g. Diabetes) and to perhaps obtain advertising revenue from the site. They could also complete self-assessments relative to their issue/s.



### 16) Electronic referrals

Referrals can be made electronically accompanied by prefilled forms and or templates (SCTT forms for example). The case worker or clinician selects the agency from the list, completes any relevant referral notes, links the template/form and dispatches the referral securely to the agency. In most cases this is an email with a link back to the site where the agency personnel will logon to gain access to the data - this is to make the referral totally secure. Referral receipts can also be noted. Note that this referral is linked to the services provided by the agency to the client.



### 17) Work load allocation tool

Conekter contains a work load algorithm to assist supervisors in allocating new clients or cases to case workers/clinicians. The software looks at the number of active clients for each case worker along with case complexity as a percentage. A supervisor is then able to allocate each new case based upon accurate information and hopefully balance the workloads.



### 18) Notes catalogued by note type

Over time the system will capture the numerous client notes based upon the conversations, appointments and meetings linked to any number of issues. By providing the functionality to create "Note Categories" these notes can be catalogued into separate and easily searched folders.



### 19) Consent engine

Conekter's consent engine allows an organisation to tailor the consent process to match their requirements whether it be capturing an online signature, completing a form or noting consent based upon a series of questions across a number of requirements.

**20) Automatically calculates clinician time with clients per funding service**

Funding structures are created by the administrators and linked to the clinicians who perform the services. Then when a clinician performs the relevant service for a client, the service times are automatically recorded. These can be adjusted and other times (e.g. Indirect, Travel, and Interpreter) can be added at the point of service.

The result is that the recorded times per service are available for any statutory or other reports. Once set up the system operates in automatic mode.

 **21) Funding at multiple levels including CDC and NDIS**

Conekter's funding engine provides a comprehensive solution for the complex funding and reporting associated with Government grants and provisions. It covers the recording and reporting requirements for funds such as NDIS, HACC, CWH, PIR and ATAPs linked to the minimum data set. Funding can be set up for the Consumer Direct Care (CDC) program as well at the session level to cover a program of paid services (e.g. physiotherapy or mental health).

A recently added function is flexible funding where funding can be linked to agencies based upon a "fee for service" basis. This is particularly effective for cases where a group service requires a high level of flexibility in its operations, associated payments and funding.

A key aspect is that case workers and clinicians just do their work without being concerned about how services are funded. We call it the "set and forget" program.

 **22) Flexible and configurable client intake from any source**

Client intake can occur from multiple sources including an inward electronic referral. New clients can be created based upon a telephone call, fax received or visiting your office. Once created, the new client record then displays in the "In Take" area of the system awaiting further actions or instructions.

The workflow tool facilitates the next stage of processing the client.

Only the mandatory information needs to be captured at this entry time. All other data can be collected when required or at a later date and time.

 **23) Operate in teams or individually**

Conekter allows case workers and clinicians to be able to work in teams or groups.

 **24) Documents, files, videos, images can be catalogued and loaded**

Any type of data can be simply loaded into a client file within Conekter be they documents, files, images or videos.

 **25) Assessments (build your own)**

Conekter provides the means for clients to be able to build their own assessments and place them inside a workflow. The questions can be constructed as a drop-down box, check box, yes/no, 1 to 5, numeric, text plus other options. Also, an assessment can be made to branch to another assessment or ignore certain questions.

These assessments can hold key questions that trigger actions (e.g. automatically create a Safety Plan and/or a Care Plan or an Action Plan. They can create an Alert based upon a certain answer to a question. Cumulative points can be totalled giving a score (i.e. Cansas). They can be re-run to measure client progress over time.



## 26) Appointment and calendar system

Conekter has a full Appointment and Calendar system. Clinicians can be linked to a location (room, area) with their available times. The system then provides the means to make appointments for clients with the clinician of choice. As services are linked to the clinician, time spent by the client with the clinician is automatically recorded against the relevant service line. Appointments can be re-scheduled, "No Shows" recorded and any "Late Arrivals" so noted. Clients can be wait listed. SMS appointment reminder notices can be created and dispatched. Invoices can be created for clients to cover any co-payments or a record of service.

A messaging system allows the receptionist to alert a clinician that a client has arrived. It will display in the clinician's message box.

The calendar system links to the appointment schedules but also makes provision so that clinicians and case workers can enter other non-client based entries (e.g. training, management meetings).



## 27) Group appointment function (e.g. fitness class)

Conekter provides the means to operate groups relevant to the services provided by your organisation. This could be HACC or CWH related and thereby reported as per Government reporting requirements or other group sessions (e.g. Health education to schools, walking groups or dietary classes).

In each case the group/class is set up and then populated with clinicians and clients along with the session times and dates. Each attendee is then marked for attendance with any "no shows" and/or Notes recorded on their file. Co-payments can also be made.



## 28) Clinician timesheets

A clinician or case worker's daily time is automatically recorded within the system. This means that a timesheet can be created outlining the various dates and times across the reporting period. An adjustment function is also provided.



## 29) Monitoring system data captured (e.g. heart monitor)

Monitoring systems are going to become an integral part of people's lives, particularly those with chronic illnesses, sports people and any with possible genetic type disorders. Conekter captures the data direct from the device (watch, mobile phone) into the client's record. The system can be set up to automatically alert a linked GP of an abnormal reading (heart rate trending high).



## 30) Rostering or Scheduling

Conekter provides the means to set up the rosters or schedules for each case worker and/or clinician. This covers their availability, breaks and holidays. Each clinician is linked to the service they provide which is in turn linked to the fund for that service. They can then be allocated for a work shift. Client appointments can then be made.



## 31) Agency management system

An Agency Management system allows organisations to be able to enter agencies, their data, services and users for use within the main system. Case workers and Clinicians can then locate the appropriate agency for the required service and link or refer the client accordingly. Conekter has a bulk load function for agencies.

Conekter also interfaces to the DHS directory of agencies and could interface to any other such directory service. Can be used for Compliance regarding Agents accreditation levels and certifications. Workflows, User Definable Fields & assessments can be utilised for Agents.



### **32) Bed Management**

Conekter provides the ability to create and manage a facility which offers clients a temporary or permanent bed. In Take workers can quickly establish the availability of the beds within the location and/or rooms.



### **33) NDIS Compliant**

Conekter is compliant with NDIS requirements covering a client portal so they can manage their own affairs, full NDIS reporting and the ability to offer clients services from sessions to individual purchases (e.g. wheelchair ramp). A key aspect is to record, manage and display the purchases and available balance. The clients support/care plans can be loaded and updated.



### **34) Agency portal**

For authorised Agencies, their staff can use the Agency portal to directly manage clients. This provides full or limited access to the system and a client's record.



### **35) Archive and retrieve clients**

Clients can be archived and retrieved at any time. Notes can be recorded against any archived client plus the review of the historical data.



### **36) Chat, SMS and Email**

Communication to clients and or other clinicians or agencies can be via the Chat engine, SMS or by Email.



### **37) Other Entities**

The structure of Conekter allows an organisation to provide its services beyond a client focus. Conekter allows records to be created which reflect other entities (e.g. Incidents, Cases, Animals). These records can then be expanded to include people, information and other relevant data. The full case management software system functionality can be utilised (e.g. Referrals, assessments).



### **38) Google maps**

Conekter can display a Google map of a client's address or an agency's location to assist case workers in matching clients to services within their area.



### **39) Budgeting, purchase orders, invoicing**

The system provides budgeting, purchase order and invoice functionality to service both clients and providers or suppliers. These are linked to the set-up funding services and streams. Invoices and purchase orders can be created in the required format incorporating logos and corporate headings.

Budgets can be set for all funds and services and then progress monitored.



### **40) Data extract tools**

Data can be extracted from the Conekter database and exported to Excel. The process is simple in that a case worker will merely tick the required fields, select a date range if applicable and press the export button. The report can be named and saved for future use. This is a perfect reporting tool for ad hoc report requests.

**41) Forums, surveys, polls, rating and feedback functions**

If required your organisation can utilise the forum, survey, polls, rating and feedback tools which reside in Conekter. The forum feature may be ideal for any client based reviews.

**42) Full Government reporting suite (e.g. HACCC, CWH)**

Using the minimum data set, Conekter produces the Government's quarterly reporting by merely running the relevant report. Because all service based work (numbers of services or hours or costs) are automatically captured and linked to the relevant Government fund, Conekter has simplified this previously arduous and complex process. A key aspect is the increase in the accuracy of reporting.

**43) Demographic reporting**

Conekter has used its powerful reporting function to produce over 100 demographic reports wherein the captured data is sliced and diced into meaningful statistical and operational information. These are displayed via graphics and numeral indicators. The reports use the data captured from all fields including the minimum data set, organisational field requirements and user definable fields. Victorian clinical indicators report is also available.

The ad hoc reporting tool gives an organisation the means to quickly answer a managerial request. An administrator merely ticks the required fields to produce the report which can also be exported to Excel.

**44) Board reporting**

The system provides a board reporting dashboard function wherein the required level of operational and financial information can be presented including KPI comparisons and benchmarks. Also available is waiting times per service.

**45) Clinician performance measurement reports**

The report toolkit delivers reports which measure clinical performance based upon the day to day activities of each clinician. Measurements are recorded at the agent, individual, team and organisation levels.

**46) Web conferencing**

A web conferencing function is available within Conekter. The only requirement is that you need the service of a telecommunications provider with a web conferencing facility.

**47) Security to Australia's highest standards (encrypted data and transactions)**

Conekter received accreditation from Victoria Police for the Commissioner of Law Enforcement Data (CLEDS) - Victorian Act of Parliament 2005. This means that Conekter's security is set to one of the highest security standards in Australia. The database and transactions are all fully encrypted; all views and transactions are logged with the user's name plus a date and time stamp. It contains a full-strength password system and can utilise PC tokens if required.

**48) Permission and roles based**

Users of Conekter are allocated a role with its accompanying set permissions. This then restricts their access to what they can view or transact based upon the agreed and set authorisation level.

**49) Full password strength system**

If required, the full password strength system can be utilised ensuring that each password is set at full strength and is changed every 90 days. No previously used password can be reused.

**50) Anywhere anytime with any device**

Access to information needs to be available to all people no matter where they are located, the time of day or what device (PC, Notebook, Tablet or Mobile) they may be using. Conekter is always available and agnostic to the device.

**51) Web content management system**

The front display web pages within Conekter can be modified by your administrators. Conekter provides a content management system to facilitate this function.

Should you wish to amend the working screens we can provide access to these pages provided you have IT personnel with the appropriate skill set.

**52) Integration management tool (taking data from other systems)**

The system has an Integration Manager tool which facilitates the secure transfer of information between Conekter and any other system. ConektLink uses an Orchestration structure containing Adaptors and the field mapping process. It can operate as a two-way data transfer link.

**53) PCEHR and secure messaging and links to GP systems**

Conekter links to third party GP systems providing the means to support secure messaging and the support and creation of a Personally Controlled Electronic Health Record (PCEHR). This provides the base structures to link to GP systems such as Best Practice, Medical Director and Medtech. This provides the means for full electronic document exchange utilising HL/7 protocols.

**54) Federated model providing a shared service concept**

Some organisations operate from a multi-tiered concept where there is a head office, branches and then perhaps sub branches or lower levels. A key aspect is to let each entity at each level fully utilise the required software for their operation but to also provide an upstream of reporting through all levels to head office or the main entity. Also, it provides the degrees of separation so that operation and data for an entity is only visible to them and any directly connected higher level.

**55) Cloud based (external or internal server)**

Being web based, Conekter can operate from any hosted environment whether it be an internal server or a third party or cloud based server environment.

**56) Microsoft based software and database**

All of the technology contained within Conekter is totally based upon Microsoft's database, coding protocols and environment.



Data

Organisations

Thinking

Security

we **ConektUp**<sup>™</sup> the dots



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