

Customer success story  
Carers ACT

Industry   
Health Services

Not for Profit 

Location  
Australia

Greentree product suite

Financial Management

Distribution

Job Costing

CRM

Human Resources

# BUSINESS SOFTWARE CRITICAL TO COMMUNITY CARE

**CHALLENGE** Carers ACT was having trouble maintaining information about its community programs because of the limited capacity of its ageing computer system and multiple databases.

**SOLUTION** Greentree's Finance, CRM and HR capabilities deliver a live 360-degree view of client data, enabling a variety of required reports to be delivered accurately.

**RESULTS** Budgets are better managed and reports are reliable, ensuring Carers ACT can provide accurate program reports to its government funders, and identify variances in its service delivery outcomes and better plan and allocate resources to meet its desired service targets..



“As a result, we're in a strong position to demonstrate our ability to meet program delivery and reporting requirements and to secure future funding, as well as effectively delivering services to our clients now and in the future.”

Vlad Umetskiy  
Finance Manager  
Carers ACT

For the 43,000 people in the ACT looking after a family member or friend with a chronic condition, a disability, a mental illness or who is ageing, reliable information about services to support their caring role is vital.

Since 1992, Carers ACT has been delivering information and referrals to family carers on aged and community care, as well as providing specialised carer support services, such as respite, counselling and advocacy in the Australian Capital Territory.

The 75 employees of this not-for-profit organisation deliver more than 20 programs funded by both the ACT and federal governments. Both the ACT and federal governments require reports of a different nature and at different times, to ensure that allocated program funds are properly spent and meet program service delivery outcomes. Complex quarterly reports are also required by Carers ACT's board of directors, to ensure accountability. Funding, naturally, is limited.

“There are some services that are in high demand, but the funds aren't available for them,” says Carers ACT's Finance and IT Manager. “The government projects that the number of ageing people is going to increase in the next decade, so it's very clear that the demand is going to increase in the long term.”

## Too many systems

Carers ACT employs more than 20 people doing impact assessment to determine clients' needs and which program can support them, or whether to refer them to another organisation. It also runs a centralised booking service for respite, so carers can have a break, and other carer services.

Before Greentree, Carers ACT was battling with too many duplicated tasks, as well as service and reporting difficulties. They used MYOB for finance, plus seven Access databases with separate CRM and service management support. These fragmented systems couldn't provide the consolidated view of carers' needs that



is essential to support a case for funding. Multiple data entry consumed too much staff time, and the reporting process was inconsistent and inflexible, with doubts about the integrity of data.

“You couldn’t see the whole picture of a particular client, because the client information was captured in a different database,” the Finance and IT Manager explains. “It was difficult also for us to provide an efficient referral process because we couldn’t see what support or resources the client already had. If the client told us they didn’t want a particular service anymore and we didn’t enter the information in the right database, they’d have to tell their situation or needs to Carers ACT staff again. This was frustrating for them and a waste of Carers ACT resources.

“From the integrity perspective, Carers ACT desired to make sure that the reports reflected real life, because they had to be entered into two different databases – service delivery and accounting.”

Carers ACT’s shopping list for a new system included a integral database encompassing CRM, HR and Finance, the capacity to accommodate changes in the requirements of funding bodies, and integration with other communication, authorisation, eServices and security technologies. They also were required to be able to report electronically into the central database of the Australian Government Department of Health and Ageing.

The shortlist of contenders included Greentree, Oracle, Care Manager (from Database Consultants), and IMS. Greentree’s Melbourne-based partner, Star Business Solutions, sealed the deal by offering all the required functionality at an affordable cost.

### Others seek the benefits

The implementation required careful scoping of the project in order to secure funding, and special customisation of the CRM module, to accommodate

various booking requirements and payment options. This work has brought extra dividends; various Greentree components are now being deployed by other Carers Associations, and at Lutheran Community Care in South Australia.

“Everyone across the organisation is using Greentree, and each function of Greentree can be used for different programs and also on different levels,” the Manager says. “Having everything in the one system gives us the whole history of the client, and the staff can then assess what best suits their needs.

“FREE (Greentree’s Financial Reporting Engine in Excel) is really good for us, because each program has its own budget related to its funding source. FREE allows them to view how they’ve spent their funds; and they have live data so they don’t exceed their budgets.”

Carers ACT acknowledges Star’s patient and painstaking implementation work. “We’re pleased with the way they’ve dealt with us, and with our ongoing relationship. We’ve had some special requirements and the implementation has had its challenges, such as funding, but they’ve stood beside us to make it work and have demonstrated their commitment to us throughout.”

The Manager says with Greentree, Carers ACT has the capacity to capture data about its existing services, as well as expand its Greentree activities, for example improved ability to communicate with clients by email, SMS and social media. It is also better equipped to handle any changes in government funding requirements. “As a result, Carers ACT is in a strong position to demonstrate our ability to meet program delivery and reporting requirements and to secure future funding, as well as making sure we’re delivering services effectively to our clients now and in the future.”



Carers ACT is the recognised and expert voice with and for Carers, as well as being the major provider of Carer services and supports in the ACT. Carers ACT is a non-government, not-for-profit association that relies on public and private sector support to fulfil its mission with and on behalf of Carers.

[www.carersact.org.au](http://www.carersact.org.au)



Star Business Solutions is Greentree International’s most experienced and well-resourced Business Partner and value added reseller and developer. Star Business Solutions has been in partnership with the company since it began and undertaken a number of development projects on behalf of Greentree that have become critical in developing Greentree’s total business solution.

[www.starbusinesssolutions.com.au](http://www.starbusinesssolutions.com.au)



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