



### At a Glance

Brightwater Care Group

### Industry

Aged Care and Senior Living

### Residents

940+

### Logistics

Facilities across metropolitan  
Perth, WA

### Solution

Epicor Senior Living Solution

### Business Challenge

Needed an integrated solution that could cater to growth – with current multiple legacy system, many functions were handled poorly or not-at-all

### Solution

A comprehensive aged and community care solution

### Business Benefits

- Accurate centralized data with real-time input from sites
- Integrated all of their systems
- System could handle full resident cycle from admission to departure
- Highly configurable, clear and easy to use

### Return on Investment

- Reporting cycle dropped from 10 days to one day
- Administration cost greatly reduced
- Time saved with automated compilation
- Shed 1.5 FTE staff

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Bret Campbell, manager

strategic finance

Brightwater Care Group

A little over a century ago, a group of community-minded philanthropists in Washington got together to set up a not-for-profit, non denominational organization dedicated to supporting people with high care needs. Today that organization, now called Brightwater Care Group, manages 940 beds and community care places across metropolitan Perth. The group also has commercial linen and catering operations, and has recently branched out into over 55 communities.

Brightwater is one of the largest care providers in Perth, and a recognized world leader in the provision of care services. It was one of the first organizations to move away from an institutional model to a more home-like environment, centered on the individual.

Taking a careful look at how things are done, with a view to doing them better, is part of Brightwater's philosophy. In fact, the group's recent implementation of a new information system was the result of just such a process.

### Situation

Bret Campbell, Manager of Strategic Finance, explains: "We were using a mix of legacy systems, which handled some of our requirements well, but many of them poorly or not at all," Campbell commented. "Our admissions, for example, were based on spreadsheets and manual records, and we had no central waiting list system. Plus, the systems we had weren't integrated, and it was a major hassle for both sites and head office to collect and compile the data we needed."

The group went through a detailed business review, the result of which was a decision to implement a centralized system that could handle the full resident cycle, from admission to departure. Brightwater chose Epicor Senior Living Solution (SLS).

"Epicor SLS offered the most comprehensive solution for our needs, plus it had a lot of value-added features - for example, CRM modules, which will be particularly useful in our catering and linen operations," said Campbell. "It was also highly configurable, clear and easy to use. We were confident our staff would be happy using it."

## Overview

This last factor was particularly important, because of Brightwater's IT history. "Unfortunately the organization has been through a number of unsuccessful software implementations in the past. Our staff was understandably pessimistic about any new system, and its ability to deliver improvement," he adds. "In addition, a lot of our people are not technical, and didn't have the time to learn a complicated system. It had to be easy and intuitive."

Epicor's demonstrated ability to implement the system successfully also helped them win the business. "Our experience has shown us that good software is not enough - do they have what it takes to make it work? Epicor had a formal and rigorous approach which ensured the implementation would go smoothly, and it certainly did," Campbell continued.

Epicor enhanced the software allowing on-site receipting and improved cash handling for the residents. "We offer a banking type service to our residents. Before we had Epicor, we maintained cash drawers and manual ledgers. It took over a week to process the information, and the cash was an ongoing security concern," said Campbell. "Now our residents have control over their money, and our trust account data is updated overnight. This is a significant benefit for us and our clients."

## Implementation

The implementation was virtually flawless, according to Campbell. "We had a few very minor bubbles, and Epicor was very responsive and supportive," he remarked. "It went so well, that this project is now used as the blueprint for successful systems implementations for the organization."

The new system was well accepted across the sites, and because it delivered on promised developments, it has broken down the poor perception to IT that was common among staff before. Campbell continued, "We had exceptionally good feedback from our people. Considering our history with IT, that's a tremendous achievement. This will yield benefits for future implementations."

Brightwater will be implementing a human resources system in the near future. The implementation and subsequent operation have been so successful that Brightwater plans to decommission its tier one financial system, and run the entire enterprise on Epicor.

## Result

"When we went to market it was for a resident/client management system that would interface to our Oracle back office system. But having seen how good Epicor is, we made the decision to run everything on it as a totally integrated system," Campbell said. "The reduced operating costs and increased functionality should deliver a strong payback to Brightwater."

The new system's more modest hardware requirements were also a pleasant surprise. "We didn't need a massive server to run the system, and we didn't need to upgrade our networks to give more functionality to the sites," Campbell noted.

## Benefits

Of course the key benefit, according to Bret, is giving staff at the sites access to all data in a real time environment, while maintaining accurate records centrally. "To move from four or five systems that didn't talk to each other, to a single, fully integrated system is a huge improvement."

The system has delivered more tangible results, as well. "Having the one system has allowed us to save 1.5 FTE staff, and reporting processes which used to take 7-10 days are now down to one day," he continues. "And that's just at head office. Our sites have been able to deploy their administrative resources better, now that there's no manual data handling to be done."

## Support

In terms of support, Campbell speaks highly of his IT partner, "Precise Business Solutions has been very active "on the ground" in managing our installation, while Epicor delivered and supported its senior living solution, plus our modifications, on time and on budget. They've both been very professional."

## The Future

As to the future, Campbell plans to use more of the software's features. "Analyzing our waiting list and managing our pipeline will be very important," he noted. "And Epicor SLS will be a critical tool for our success in the retirement village market, which we've recently entered."

"Having a good system is critical to growth, and that was one of the reasons we decided to invest in our core systems," Campbell explained. "We're delighted we chose Epicor SLS - it's really going places."

The Epicor SLS module allows community care providers to manage provision of community care by tracking client information including case and progress notes. As part of the complete Epicor SLS, the module provides a 360 degree view of a client from the moment they inquire or are waitlisted until they are discharged out of a community care program. Regardless of whether a person is an existing community care and/or respite client, or on the waitlist for another service history is maintained all under the same person. The Community Care module provides the following functionality:

**Client Management** – all the key information about a client is captured, from demographic and billing information to referral history. Most importantly, if a client moves from one program to another or to residential care, all history is maintained under the same person.

**Contact Management** – contacts can be entered for each client, including emergency contacts, GP's and allied health professionals. A complete history of all communication between the care manager and the client or their contacts can be entered.

**Waitlist Management** – a person can be put onto multiple waitlists if required and filtered by key criteria such as LGA, date of last assessment, country of birth, gender and financially disadvantaged status. Using the waitlist management function, important information such as how long a person is on the waitlist before an offer is made, or how many people move to residential care before they are offered a placement can be extracted.

**Service Coordination Tool Template (SCTT)**

**Assessments and Reviews** – the SCTT assessment tool, which was developed by the Department of Human Services, is a very comprehensive and user friendly tool for conducting assessments and reviews. The tool also provides for the electronic sending out of referrals.

**Case/Progress Notes** – notes resulting from home visits, phone conversations, emails and faxes are all maintained in one central location under the client. All notes are date and user stamped to provide a full audit trail of updates, spell checked for accuracy and secured once committed.

**Community Care Planning** – clients' needs are addressed and documented in a care plan which identifies the client's care needs, goals, interventions and outcome. Care plans are linked to the case/progress notes for substantiation.

**Service Management, Scheduling and Provision** – whether you hire internal staff or use external service providers, you can schedule different services and provide the client with a weekly schedule and care plan for their review. It caters for one-off, suspended and informal services, and where external service providers are used, calculates expected costs.

**Client Billing** – clients can be billed a daily, weekly or monthly fee according to their ability to pay and direct debited if required. When on leave, the care manager determines which services continue, which are suspended and whether billing continues during that period.

**Government Funding Reconciliation** – the reconciliation tool caters for Commonwealth funded programs such as CACP and EACH to ensure that any discrepancies between expected and actual income are tracked and collected.

About Epicor

Epicor is a leading provider of enterprise business software solutions to the midmarket and divisions of Global 1000 companies. Founded in 1984, Epicor serves over 20,000 customers in more than 140 countries, providing solutions in over 30 languages.



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