



WHITE PAPER

# How to Choose a Mobile Health Care and Services Delivery Solution

Consider All the Factors Before You Decide



# How to Choose a Mobile Health Care and Services Delivery Solution

## Executive Summary

Health care delivery has evolved rapidly over the last decade. With a high percentage of personal services being delivered in the home by paraprofessionals, along with medical care provided by health professionals, your organization now faces an unprecedented level of complexity. You must manage and monitor a distributed work force with varying levels of skills and expertise. Mobile computing devices can make this easier, but only if you have a complete, “industrial-strength” solution that enables your field and office staff to be more efficient and productive, and your management team to have better insights into the organization’s overall performance.

In this white paper, we will examine the important components you should consider when evaluating mobile health care and services delivery solutions.

- Fundamental capabilities that are “table stakes” for any vendor to be considered
- More advanced capabilities that drive the productivity and efficiencies that help reduce costs

- Identifying a solution that will work with and be cost-effective for your IT infrastructure
- Enhancing real-time care and work force management
- Optimizing your organization through analytics and reporting
- Uncovering the true costs and value of implementation, on-going services and maintenance, and overall cost of ownership

Finally, we will provide you with a set of questions that your team can use to evaluate vendors and their offerings.

## Introduction

Do you remember when “health care delivery” meant driving yourself to the doctor’s office? Once you were there, you would sit in the waiting room until your name was called, then you would go into the treatment room where a nurse and, eventually, a doctor would take your vitals, perform an examination, and prescribe your treatment. Even if the treatment was as simple as “take two aspirin and call me in the morning,” there was something reassuring about having that immediate

feedback. For some people, that scenario is still very real, but for you, it likely seems as quaint as a horse and buggy pulling up to the general store.

Health care delivery has evolved rapidly over the last decade. Care now often takes place in the home, administered by health professionals. And, while medical treatments are certainly a meaningful portion of today's care, personal services such as meal delivery and bathing comprise a much-larger slice of the services pie.

While this is more convenient for the client, it adds an enormous level of complexity for the care delivery team and organization: your organization. You must be able to:

- Schedule and deploy caregiver staff efficiently
- Track the amount of time spent in transit and giving care
- Record and report the visit and activities that occur during the visit
- Improve health care outcomes

The proliferation and ubiquity of mobile computing devices should make these tasks easier, but that doesn't happen automatically just because all your staff has a cell phone or tablet. You need a complete, industrial-strength solution that enables both your field and office staff to be more efficient and productive.

What does a complete mobile health care and services delivery solution look like? How do you choose the best one for your organization?

There are many factors to consider – from technical to financial to service and support. A robust solution:

- Improves care outcomes, care coordination and business results
- Saves time and reduces errors by providing all caregivers with helpful, easy-to-use software
- Enables real-time care tracking and management
- Streamlines communication and improves workflow

- Records accurate data about care delivery
- Optimizes deployment of field work force and provides up-to-the-minute agility
- Offers services that enable successful deployment, adoption, and sustained use over time
- Is priced affordably and offers a flexible licensing and deployment model
- Works for your organization now and in the future

With so many considerations, the process of evaluating solutions can seem daunting, but it doesn't have to be. In this paper, we will describe the basic requirements of a mobile health care solution and help you think about the capabilities that your organization currently has and will need to be competitive. We will discuss the important needs of your field and office staff, as well as the considerations for your IT and technical staff. We will examine the breadth and depth of capabilities that caregivers really need and look at the challenges involved in managing real-time care across a distributed workforce. Finally, we will look at the pre- and post-purchase support you should expect from a top-tier solution vendor. All of these factors contribute to your total cost of ownership and relate directly to how successful your operation can be.

At the end of this paper, we will provide you with a handy reference chart that you can use to compare offerings by different vendors, including the most relevant and important questions to ask and consider during your evaluation. Armed with this understanding, you will be able to choose the best mobile health care and services delivery solution for your organization.

*The proliferation and ubiquity of mobile computing devices should make the delivery of mobile health care easier, but that doesn't happen automatically just because all your staff has a cell phone or tablet.*

# Determining the “Must Have” Capabilities

To function efficiently and deliver significant value, a mobile health care delivery solution must work well for three primary groups:

- Caregivers in the field
- Office staff
- IT department

Each of these groups on its own is important. Together, their requirements represent the essential elements that you must ensure are delivered. If a mobile solution can't address all of the important needs of these three groups, it isn't a “solution” at all.

What's more, the solution should work in concert across these constituencies. That is how your organization will benefit the most – from optimizing communication and workflow, and keeping essential data flowing when and where it's needed.

Let's look first at how a strong mobile solution benefits your organization's most visible point of contact with your clients – the caregiver in the field. Before care can be administered, the caregiver must know where to go, how to get there and what to do once on site. If these points seem obvious, think about how they occur today. Are directions printed on paper – for the caregiver to read while driving? What happens if there are last-minute changes in schedules or care plans – how are those updates handled? This becomes even more challenging if the caregiver is en route when changes need to be made.

With a full-featured mobile health care solution, the power is in the palm of the hand. All client information, schedules, directions and care plans are easily accessible from an easy-to-use mobile app. This provides an immediate productivity boost every day. Each morning, every caregiver can simply pull up the day's schedule and assigned activities before leaving home – there's no need to drive into the office. If care

needs change or a schedule is switched, the caregiver gets alerted instantly.

Of course, some of the biggest advantages of a mobile solution over traditional paper methods come from the advanced GPS capabilities of mobile devices. Built-in maps help guide your field staff step-by-step to each destination, which can reduce mileage costs and the time needed to travel between appointments. GPS tracking also provides an extra level of safety for field staff. If their vehicle breaks down or they are involved in an accident, your operations team can be notified of the exact location so they can send help immediately.

Further, real-time tracking improves your ability to accomplish electronic visit verification (EVV). With a quick tap on a screen, a caregiver can pinpoint the time and location of a visit, proving she is where she needs to be. This saves time, since the caregiver doesn't need to place a phone call. And since a growing number of homes no longer have landline phones, this modern mobile visit verification (MVV) is faster, easier, more accurate and efficient.

The benefits of MVV don't end with confirming a site visit, however. With each step of the care plan displayed on the mobile device, the caregiver can quickly see what actions need to be taken, and then either the caregiver, the client, or both can confirm the actions that were taken. All data from the visit, including clinical information or personal care services recorded by the health professional or paraprofessional, get transmitted automatically back to the office. Some vendors even offer an option for the client's family members and authorized third parties to have secure access to the visit and care history.

A strong mobile health care solution enables all caregivers, including professional staff, paraprofessional staff and volunteers, to focus on delivering care and to spend less time doing paperwork. The operations team in the office also gains substantial benefits from a robust mobile solution. Because the technology provides a direct connection to people in the

field, the office staff has a real-time view of the entire care cycle.

Missed visits are costly, but they can be eliminated completely through an effective mobile solution. Once the operations team has the complete picture of the field staff's location and progress, they can make adjustments on the fly to communicate changes and coordinate care.

The data flowing back to the operations team provides many more opportunities to improve efficiency and productivity. For example, when a health professional administers care on-site, the system can track and record all vital signs and other aspects of the care protocol. Should a change in condition occur, a real-time alert will notify the client care team, and they can then contact the onsite professional securely with instructions on actions to take. Since care conditions

can be observed and documented in person and in real time, care can be affected in a positive way.

With many organizations growing their staff, a mobile solution can provide substantial support for training new hires. A supervisor can monitor real-time actions by a new field staffer and make corrections immediately, if needed. Or, a supervisor might use information from a set of site visits to illustrate how to document activities properly or to review other important workflow tasks, such as sign-in and sign-out.

By providing insight into care as it is happening and keeping communication flowing freely between office and field, the best mobile health care delivery solutions greatly improve efficiency and productivity.



A complete solution will improve care quality, increase compliance, enhance communication and reduce cost. It will automate the flow of real-time information; be easy to use by professionals and paraprofessionals in the field; improve coordination across the entire care team; and streamline workflow for care coordinators, operations and financial staff, and IT.

## Identifying a Solution that Works for IT

While the field and operations teams form the backbone of a health care delivery organization, IT is the nerve center. If a mobile solution doesn't integrate effectively with your IT systems, it can become expensive "shelfware" – costly and under-utilized.

IT and Operations leaders know it's not just the technology that matters – it's equally important that your people and organization can easily adopt that technology. If it's difficult to learn or use, or if it won't play well with existing workflows and processes, again, it's no solution.

When your IT staff thinks about implementing and supporting a mobile health delivery system, they must consider:

- How to provide flexibility for Bring Your Own Device (BYOD) initiatives and the myriad of devices people use in the field – and still be able to support the corresponding large matrix of computing platforms and operating systems.
- How to meet government regulations for data privacy and security – while delivering strong, secure communications capabilities for a distributed workforce.
- Where to store huge amounts of data in many different formats – while making it accessible at a moment's notice.
- How to keep the system up and running 24x365 – and have a rock-solid business-continuity plan in case of disaster.
- How to integrate the solution and make it communicate with other systems inside and outside your firewall – while keeping a tight lid on data and system security.
- What is the total cost of ownership for capital purchases and ongoing licensing and maintenance?

When evaluating vendors and their offerings, it is imperative that you carefully consider all of these factors. With a mobile solution, device management and information security are paramount. Your IT staff should have easy-to-use tools that tell how many devices are currently registered to each employee, as well as which employees previously used that device. Should one of those devices go missing, the tools in your mobile solution should be able to locate it or disable it so that protected health information (PHI) cannot be accessed.

A compelling solution will help ensure that the technology meets your business needs, is highly reliable, and delivers a high return on investment. But falling short on any one can quash your system's success.

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## Moving Beyond the Basics

Now that you have an understanding of the basic requirements, let's look at other aspects that go beyond the "good enough" to give you the best mobile solution that fits your business model and objectives.

For most home care agencies, the model for ongoing success and growth of the business comes down to delivering high quality care in ways that align with reimbursement models.



Now, and increasingly in the future, the ability to cost-effectively improve outcomes is as important as the coverage to perform activities.

Today, your success is likely dependent on your organization's ability to staff adequately so that you can perform certain levels of activity. Now, and increasingly in the future, the ability to cost-effectively improve outcomes is as important as the coverage to perform activities. This marks a substantial evolutionary shift in the marketplace.

Choosing the right mobile health care solution will be as essential to your organization as ERP systems are to manufacturers. As with ERP, the initial value is derived from providing structure and workflow and reducing costs by eliminating inefficiencies. Later, your largest competitive advantage will come from your ability to use data to improve results. The biggest winners will be the organizations that shrink the amount of time needed to get to this data-driven business model.

## Providing the Capabilities Caregivers Really Need

We previously said that some of the biggest advantages a mobile solution has over paper-based systems come from GPS capabilities. But mobile data provides many other benefits for caregivers that improve efficiency and productivity while helping your organization cut costs. In a typical caregiver's day, actually providing care consumes only a sliver of her time. The majority of time is spent checking the schedule, navigating to destinations, reviewing the care plan, verifying visits, and

reporting mileage and activities that were completed.

Consider for a moment each of these individual time-takers. If any one of them could be completed faster on every visit, how much of a productivity boost would that deliver over the course of a week, month or year? How much happier would your caregivers be if their mundane tasks were easier and faster?

As an example, let's go back to the GPS capabilities for a minute. While out in the field, a caregiver should be able to access directions and route guidance from within the same app that contains all the details about the next appointment. If she has to switch to another app, time is lost. From the operations standpoint, the mobile solution should enable you to set – and enforce – route options: shortest distance, fastest route, differential from office, etc. Some agencies use complex mileage calculation rules due to union laws or regulations. Organizations should look for a solution that can handle the specific calculations they need to mitigate any additional back-office work.

Scheduling and reporting are two other areas where top mobile solutions excel. Caregivers should easily be able to view updated schedules throughout the day with a quick glance at their phone or tablet. The caregiver should be able to see the current day as well as upcoming schedules. A simple, "I'll see you next Tuesday" can help build a closer relationship with

the client. If the schedule shows the duration of each appointment, that can help keep the caregiver on task and on time. Some organizations also need of a solution that supports shared care, enabling accurate, automated timekeeping when a caregiver pauses a client visit to attend to another client, then resumes the previous visit.

Some of the highest value your agency can receive comes from enabling caregivers to perform their reporting tasks efficiently. Electronic forms and mobile visit verification (MVV) help speed the data input and reporting process. They can also ensure all necessary or required information is documented. Busy caregivers will appreciate prompts if they inadvertently miss a field, so they can record the information while it's still top-of-mind. A caregiver's day can be hectic, and being mobile means connectivity is not always reliable. However, a solid mobile program helps caregivers by allowing them to pause input. The program should automatically save the data, then upload it as soon as connectivity is restored.

Small changes in workflow and ease of use can make huge differences in the adoption and use of a mobile solution, and that in turn drives an increase in productivity.

## Enhancing Real-time Care and Work Force Management

When people talk about complex systems, they often say, "There are lots of moving pieces." When those "pieces" are human beings, the complexity ratchets up dramatically. Your systems and processes need to communicate information accurately, promptly and securely to ensure the safety and privacy of caregivers and clients.

The best mobile health solutions provide handy dashboards that present relevant information to both the care and operations teams. Ideally, each team's dashboard would be an interactive, real-time, customized portal that's unique to their needs.

Service coordinators, for example, should have real-time insight into where your employees are during their workday and what their progress is on completing their assigned schedule. Which one is closest to a specific patient? Who has finished their assignments early and can pick up more patients? Who has a gap in their schedule? When you can make on-the-fly adjustments to get the right people in the right place at the right time, you can reduce costs and improve staff and patient satisfaction.

Having access to real-time information can also improve public health safety. Let's look at an example. While with a client, your health care professional observes and reports a condition that indicates the client may be infected with a disease that has had a recent outbreak

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in the client's vicinity. The onsite caregiver could alert the care coordinator by sending a secure text message about this condition. The coordinator could immediately contact the caregiver with actions to take to prevent spreading the disease further. Separately, the operations team manager would get an alert that the caregiver had

been detained. The manager could use this information to take immediate action, scheduling another caregiver in the area to assume the remainder of the day's visits. In this way, one common piece of information was distributed and used in two ways, helping to drive real-time positive outcomes.

"Real time" should be the standard for work force management capabilities. If your organization can't be alerted immediately when a situation needs to be addressed, then it's no better than paper that's sent out in the morning and checked at the end of the day.

## Optimizing Your Organization through Analytics and Reporting

Having access to real-time information is imperative for delivering safe, high-quality care. But your health care solution must also have strong reporting and analytical capabilities to help your organization achieve operational excellence.

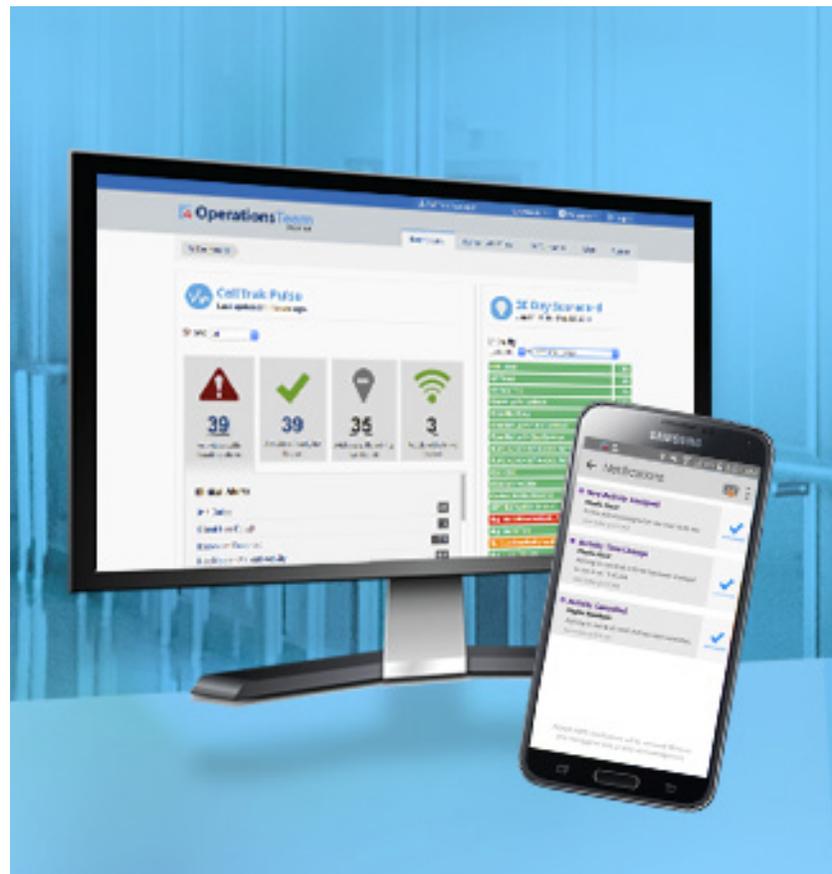
You should have the ability to view 30-day summary "scorecard" data for your business, or filter the data and drill down for a closer look by team, location, discipline, program, client or staff. Of course, there should be access controls to prevent the misuse of data and to protect client privacy.

Here again, the ideal solution provides unique reports and dashboards for distinct uses. For example, the management team needs a dashboard that provides an overview of performance for the entire organization, or a region or even down to the branch/office level. This helps answer questions like, "What percentage of our visits are missed?" and "What percentage of our visits started (and/or ended) on time?" Caregivers, on the other hand, appreciate reports on their actions and

results so they can continuously work to improve their performance and deliver the highest level of outcomes.

As you evaluate solutions, look for one that offers deep and flexible reporting. Here are several other examples of analytics that will be useful to your organization:

- Accurate data on time worked and mileage assist in payroll management.
- Performance information by caregiver is useful for coaching and individual improvement plans.
- Work force deployment and activity time data help operations to better understand and adjust the amount of time allocated in the schedule versus the actual time needed. This helps to avoid "over-serving and under-serving" client needs.



"Real time" should be the standard work-force management capabilities. If people in the field and the office can't be alerted immediately when a situation needs to be addressed, then it's no better than paper

- Utilization reports improve your ability to fine-tune schedules so the field staff can make more visits per caregiver.
- Deployment and utilization data also help HR in determining staffing needs.
- Systems-usage reports can highlight areas where your staff is not using the full capabilities of the system. These could be opportunities for additional training or changes in processes to improve efficiency and productivity.
- Client and care history help the clinical staff plan and coordinate treatments.

When you can see the big picture and apply it in the day-to-day operations, your organization becomes more agile and works more efficiently.

## Implementing a Solution that Works for You

Organizations that still rely primarily on paper-based systems can easily get overwhelmed at the thought of converting to an electronic mobile health care solution. However, they needn't be concerned if they find the right vendor partner.

You have probably heard the phrase, "It takes people, process and technology." Top-tier vendors have integration specialists who understand not only the computing systems but also the intricacies of health care.

The best solution providers often have key staffers with decades of field experience. These implementation professionals have successfully transitioned scores of clients to the e-health world. They are skilled in translating analog processes to digital and in finding opportunities to improve quality along the way.

We cannot emphasize enough the importance of having a solid implementation plan. This is the first step in introducing the solution to your organization, and you know how important first impressions can be. Be

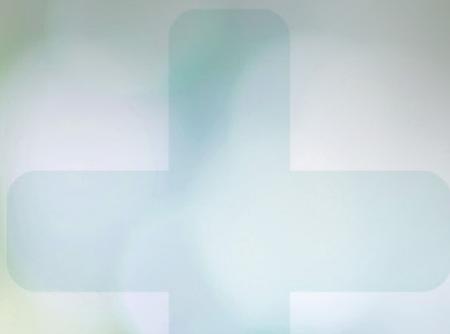
sure the vendors you evaluate have a thorough, well-documented project plan for people and processes as well as the technology – and have the staff with all of the skills needed to make it work well. It should go without saying, but that plan must also match your organization's needs and goals.

Look at the composition of the implementation team. Does it include people with technical, operational and field experience? Have they worked with organizations similar to yours in size and structure?

Be sure to look for an organization that provides solid best practices from their existing implementations. Training and ongoing support are also "must have" requirements. A single training "event" is less than ideal. Success happens over time as people experience a new system and learn from it. The best vendors understand this and will provide a training program that capitalizes on your implementations rollout and growth. Speaking of growth, you should, inquire also about how the vendor will handle growth and change management. Finally, evaluate potential vendors on post-

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implementation services. What do they provide as part of the initial contract and what are add-ons? Are the services solely technical, or do they include helping you use the data to improve your operations? The best vendor for you will be a partner in your ongoing success.



## Uncovering the True Cost and Value

After you have reviewed all the functionality and benefits, and after all of the technical evaluations are done, it's time to turn attention to pricing and licensing.

As with any enterprise-grade solution, you should evaluate based on total cost of ownership. What is the overall benefit of this solution to your organization? What are upfront costs? How much will it cost to implement and maintain over time as your business evolves? Answering these questions sets you on the path to uncovering the value you will derive from enhanced productivity and improved management insight.

One vendor may offer the lowest initial price, but careful examination might expose the product to be a bare-bones offering with important elements, such as training and post-implementation services, only provided as "a la carte" options. Another vendor might promise a "package discount" if you bolt on their product to other offerings they have. But these products often end up costing more, either from implementation fees for customizing them to meet your requirements or in "lost opportunity" costs because they don't perform as you expected.

Also, be mindful of flexibility. How easy is it to scale your solution as your needs change and grow? What's the cost for that? How long is the standard licensing agreement? What additional costs might you incur for

hardware, software, devices and data plans?

Often overlooked, but arguably one of the most important considerations, is how well the vendor's contract fits your business model. For example, organizations with only full-time staff may prefer the certainty of a model that's based on per person per month. Likewise, organizations with members might prefer per member per month. But organizations that have a large part-time staff or volunteers might be better served by a per-visit model. The best model for you today might not fit your needs in the future, so you should thoroughly consider the options offered and the flexibility to meld them or change your model over time.

A solution only works for you if it works with you.

## Choosing the Best Partner for Success

We have looked at many elements of a complete mobile health care solution, but one crucial evaluation category remains: the viability and approach of the vendor you choose.

Look at the company's history. How long has it been in business and what percentage of its attention is devoted to the home care/hospice/community care market? Consider the make-up and reputation of the leadership team. Does it have experienced, respected technologists and experts in the field of home health care? Are their

opinions sought out for speaking engagements and policy-setting boards?

In the technology world, changes happen rapidly. How does the company respond to key technological shifts? Is the mobile solution you are considering a core piece of the company's business, or is it an "oh yeah, we have one of those"? Finally, inquire about the product development approach and cycle. You want to be assured that development is planned, purposeful and frequent, not catch-as-catch-can or at the whim of the largest client.

After all, at its essence, software is just a series of 1's and 0's strung together to execute defined tasks. The truest, largest value comes from the people and organization behind the code. These people set the standards and drive the development of the solution you will rely upon. They should be your trusted partners for success.

## Selecting Your Industrial-Strength Solution

At the end of the day, it's all about the client. But in the middle of what you do in providing home care, there is a world of ways your agency is at risk of losing profit, jeopardizing care quality, risking non-compliance and not running as efficiently as you could.

An industrial-strength mobile health care solution can help. The right solution goes far beyond the "time and attendance" of basic electronic visit verification (EVV) and mobile "solutions" that are really nothing more than web pages accessed via a phone or very basic mobile apps. By automating workflow and providing real-time information for ongoing business and care optimization, a mobile solution helps your agency verify visits electronically, coordinate care, achieve visit and care compliance, go paper-free (saving time and reducing errors), increase visits per caregiver, and, ultimately, deliver improved outcomes.

There are many factors to consider – from technical to financial to service and support. A robust solution:

- Improves care outcomes, care coordination and business results
- Provides helpful, easy-to-use tools to professional and paraprofessional staff so they save time and reduce errors
- Enables real-time care tracking and management
- Streamlines communication and improves workflow
- Records accurate data about care delivery
- Optimizes deployment of field work force and provides up-to-the-minute agility
- Offers services that enable successful deployment, adoption and sustained use over time
- Is priced affordably and offers a flexible licensing and deployment model
- Works for your organization now and in the future

## Getting Started with Your Evaluation

Now that you have a more thorough understanding of the important elements comprising a potent health care and services delivery solution, you are fully equipped to evaluate and select the best one for your organization.

To help you in your important selection process, we offer the following evaluation checklist. We encourage you to share it with all the members of your evaluation team so they have a common set of criteria to review.

A mobile health care solution can enable your organization to deliver high-quality health care and personal services much more efficiently. It can help you to improve compliance, care quality, and communication while cutting your costs. It can also help you to improve client and staff satisfaction.

You can use this document to do a thorough comparison of solutions across many dimensions and find the one that best meets your organization's needs.

## Basic Questions to Ask About A Mobile Health Care Solution

This set of questions covers the basic capabilities that a mobile solution should have to support both the caregivers in the field and the office staff, as well as a few key questions about support.

Question	Why it Matters	Option #1	Option #2	Option #3
If you have clinical/professional staff, is there a mobile app designed for them?	In some cases, the needs of the clinical/professional staff are fairly complex. In other cases, for example when the staff already uses PCs to receive and record certain information, they may have relatively simple add-on needs for visit verification, time and/or mileage. Either way, a purpose-built app is likely to lead to successful adoption and consistent ongoing use.			
If you have services/paraprofessional staff, is there a different mobile app designed for them?	The needs of paraprofessionals differ from those of professionals.			
Which types of devices are the mobile apps available on? PCs? Tablets? Mobile phones?	Availability by device type affects your total cost of ownership, your team's satisfaction and your client's experience.			
Are the apps native to mobile devices or do they run in an Internet browser on the device?	Native mobile apps typically run when there is no Internet connection, and their design provides a better user experience for people on mobile devices, especially smartphones.			
What client information is available via the mobile apps? Basic demographic information? Other notes about the care setting, preferences, etc.?	Providing caregivers with all of the right information enables better care and improves caregiver and client satisfaction.			
How are visits verified? Are they verified electronically using GPS?	Electronic visit verification (EVV) via a mobile solution (also known as "Mobile Visit Verification" or "MVV") helps to prevent fraud and provides an accurate record of care delivery. Automatic, GPS-based verification is an easy, valid, especially accurate, method.			
Are schedules for all caregivers available via the mobile app?	If only certain caregivers' schedules are available, some benefits of the system will not be realized.			
Does the solution support both scheduled and unscheduled visits?	In many professional disciplines, and across caregivers in emergency situations, the ability to adequately and digitally document an unscheduled visit is invaluable.			

Question	Why it Matters	Option #1	Option #2	Option #3
How often do updates of caregiver schedules and other data appear on the mobile device?	More frequent updates lead to fewer missed visits and better staff and client satisfaction.			
When and how is the caregiver notified of schedule changes?	Prominent on-screen notifications – and confirmation of received notifications – lead to improved communication and better results.			
Can caregivers see schedules for future days? How many days can they see?	The ability to see schedules in advance enables better planning and potentially results in cost savings. Many people like to plan a week at a time.			
Are the specifics of both health care and personal service plans available via the device?	Listing the specific activities improves care compliance and can lead to improved outcomes.			
Can care and service activities be designated as required or optional?	Identifying required and optional activities enables caregivers to deliver high-quality care and use time wisely.			
Can rules be applied to generate new activities or questions to ask?	Using data to generate next steps in real-time can improve outcomes and client satisfaction.			
Can unplanned activities be recorded?	The ability to document unplanned activities performed during a visit generates a more complete care record and may lead to better outcomes.			
How is visit time calculated? Is it validated via GPS?	The ability to document unplanned activities performed during a visit generates a more complete care record and may lead to better outcomes.			
Can non-visit time (e.g., trips for supplies, training, office meetings, etc.) be recorded?	Accurate visit time documentation enables contractual compliance. The data can be used to cut costs and/or improve productivity by reducing over- and under-serving.			
How is care and service delivery monitored? What real-time alerts can operations staff see? How are alerts presented to the office staff?	An accurate understanding of how people spend their time may be used to improve the ratio of client-to-administrative time and to boost productivity in terms of visits per caregiver.			
Is the current location of each caregiver visible to the operations staff? How easy is it to securely communicate with staff?	Visibility and responsiveness go hand-in-hand to improve care quality and operating efficiency. Knowing the location of your staff is the most basic requirement for care coordination, especially when emergencies occur and for worker safety.			
How often is data sent from the mobile device back to the office or database?	More frequent sending of visit data back to the office improves responsiveness, efficiency and worker safety.			
What happens if the device is offline before or during a visit?	When a mobile device can be used offline, and automatically store and forward information, both care delivery and operating efficiency improve.			

Question	Why it Matters	Option #1	Option #2	Option #3
How does the solution support your standard operational workflow? For example, is there workflow that enables some items to be reviewed/responded to before they are put into other systems? Can documents prepared in the field be reviewed, commented on, and signed off by office staff? Etc.	The more you can eliminate exceptions to the use of a mobile solution, the more you will fully realize its benefits.			
How is travel time calculated: by GPS or manual entry?	A mobile solution should be able to automatically generate travel time and mileage information, and apply relevant mileage policies. It improves accuracy, enables better planning in the field and by care coordinators/schedulers and reduces the administrative burden.			
Is contact information available for the entire care team?	Ensuring that care team members have the full set of relevant contacts improves communication and responsiveness, and can lead to improved outcomes.			
Can caregivers communicate with each other and/or the office via secure text messaging?	Communication between care team members should be immediate, secure and added automatically to the care record.			
Can secure photographs or videos be taken on the device and transmitted?	Photos can be used for many ways to improve communications and documentation, but their transmission and storage require special handling to comply with security regulations.			
Is all of the data from all caregivers' visits, including alerts, available to the office staff? When is it available? Is it available via a portal or other application, or only via a production report?	When there is easy, real-time visibility into what is happening in the field, clients, the agency and caregivers all benefit.			
When is the clinical- and services-related paperwork available to the office staff?	When paperwork is replaced with real-time digital data, responsiveness and accuracy improve, saving administrative time, reducing risk and improving staff satisfaction.			
How long does training the field staff typically take?	Ease of use is likely a critical factor in your decision process as it affects adoption and ongoing use. Apps that are easier to use are more likely to be accepted and typically require less training, enabling you to realize a return on your investment more quickly.			
How long does training the office staff typically take?	Much of the value of a mobile solution is realized "behind the scenes" from the software used by people in operations and other administrative functions, and by automating workflow and data transfer. As is the case with apps, software that is easier to use is more likely to be accepted and typically requires less training.			

Question	Why it Matters	Option #1	Option #2	Option #3
What are the vendor's support policies? Are there support staff who are knowledgeable about the workflow that affects caregivers? About the devices the caregivers use? Are support options available (e.g., all users versus super-users)?	Different agencies have different needs and budgets – and they change over time. Vendors who offer high-quality support of various types – especially ones that go beyond technical software support only – are typically better long-term partners.			
What volume of users has the vendor supported? How many users in an agency? How many total users?	Especially for large organizations, understanding the vendor's experience is an indicator of its ability to help you get started quickly and support you well.			

## Does the Solution Provide Additional Important Capabilities on the Mobile Devices?

Many of the items in the previous section related to the caregiver's experience using a mobile device. This section covers additional capabilities that may be important to your organization.

Question	Why it Matters	Option #1	Option #2	Option #3
Does the mobile app support all models of care delivery that are relevant to you? For example, can visits be paused and resumed to support a Shared Care model?	When agencies must have exceptions to using the mobile device, paper persists and adoption may be negatively affected. Full support of your delivery models overcomes that risk.			
What clinical information is available to authorized members of your organization's care team in real-time? Is information about trends in clinical information available?	When caregivers have the information they need, they can make better decisions that can help to improve care quality and outcomes.			
Can clinical information be securely shared with third parties, including physicians, guardians and/or family members?	When information needs to be shared beyond your staff, both timing and security are critically important.			

Question	Why it Matters	Option #1	Option #2	Option #3
What type of forms capability is available on the device? In what ways can data be collected (e.g., check for completed items, add notes, use responsive forms, etc.)? Can forms be customized to meet your organization's need? Can they be "paused" and returned to?	Care delivery – from intake to initial assessments to the provision of ongoing care to discharge – includes many forms. When forms are on a device, they are always available; data can be entered faster and with greater accuracy using prompts and pre-filled fields; completion can be tracked and ensured; and information can be transferred to your systems without delay or errors.			
What information about activities completed, mileage, etc., is reported on the device to the caregiver?	The administrative burden on field staff is reduced, as is time spent reconciling differences, when caregivers have an automated report that matches what the office has.			
Can visits be "double-verified" using signature capture, near-field communications or other technology?	If your funder requires it, or if you choose to provide additional proof of a visit, support of a second verification method on the device is an easy way to meet the need.			

## What Information is Available for Quality Improvement, Better Risk Management and Care Delivery Optimization?

The best mobile solutions combine data collected at the point-of-care with data in other systems. This enables you to have important decision-making information so you can deliver care and services more effectively and efficiently. In addition, this can help you to reduce administrative costs, errors and the hassle of reconciliations by automating how field data enters your back-office systems and EMR.

Question	Why it Matters	Option #1	Option #2	Option #3
Other than alerts, what real-time information is available to the operations staff?	Visibility and responsiveness go hand-in-hand to improve care quality and operating efficiency.			
What operational reports are available?	Reports should contain information that can be used to track results versus goals, to make changes that improve operations, and to more effectively manage and coach staff.			
What ability is there to filter/drill down into the information? For example, can the information be viewed at the organization level, by branch, by person, etc.?	Sometimes the "right" lens is a broad one, other times it is a narrow one. The ability to filter/drill down enables people to get the information they need, when they need it.			

Question	Why it Matters	Option #1	Option #2	Option #3
Is there a portal with a dashboard or another means of easily viewing key information?	Reports that contain rich detail are valuable, but dashboards are more effective for viewing performance vs. KPIs and getting other summary data.			
How is secure access to information managed?	Not everyone in your organization needs, or should be given, access to all of the information.			
What routing/mileage options are available (e.g., shortest distance, fastest route, differential from office, etc.)? Can those options be configured? Can they be enforced?	Many organizations, especially ones with multiple funders and/or unionized staff, must follow complex mileage rules. A solution that automates all of the rules saves time and money, and improves everyone's satisfaction.			
Is performance information by caregiver available to monitor performance and for use when coaching?	Whether you're monitoring the performance of a new person or looking for performance outliers among all of your staff, availability of performance data versus key criteria by caregiver is valuable.			
If you want it, is integration with your Scheduling, Payroll or other business systems available? What if the business system is from a different vendor?	The extent to which a mobile solution integrates with your relevant back office systems, whether or not they are all from the same vendor, affects your return on investment, employee satisfaction and, in the long-run, your ability to change systems.			
If you don't want integration with your business systems, is a version available? Are its capabilities the same as the integrated version's?	If, as is the case for many smaller agencies, you don't have the full suite of business systems, or if the systems you use lack sufficient interoperability, you may want a "stand-alone" version so you can still realize the benefits of a mobile solution.			
Are the data from the clinical staff and the services staff available via the same database?	The ability to see the complete care and services picture can lead to better outcomes and more efficient care delivery. And, complete electronic records make it easier to prove care was delivered if you are audited. If a vendor makes it easy for you to respond quickly and accurately, you save time and money.			

## Technical Considerations & Privacy Matters

The decision process for selecting a mobile solution includes many technical considerations that affect an organization's short- and long-term success with the solution. This section covers both hardware and software issues, as well as privacy matters that are critically important in health care.

Question	Why it Matters	Option #1	Option #2	Option #3
Does the vendor support a Bring Your Own Device (BYOD) policy?	The ability to deploy a mobile solution via a BYOD policy can offer significant benefits to an organization, especially if the team has a mix of disciplines and includes full- and part-time staff and/or volunteers.			
How much data does the solution typically use per month?	The amount of data used by the mobile solution may be a factor in the total cost of ownership.			

Question	Why it Matters	Option #1	Option #2	Option #3
What effect does use of the solution have on the mobile device's battery life?	If the device's battery does not work for at least an entire day, user satisfaction can decrease and adoption may be affected.			
What % uptime has the vendor historically delivered?	Because your business will rely on the mobile solution every day, proven high uptime is a critical factor in your decision.			
What mapping software does the vendor use?	The vendor's choice of mapping software, and how maps are displayed, can affect accuracy, the amount of manual work required (e.g., for new neighborhoods), and employee satisfaction.			
Does the software meet all relevant requirements for data security (e.g., HIPAA)?	Full compliance, including communication such as messaging and photo sharing, is not optional.			
What forms of security are available on the application and device? What is required to reset passwords?	The vendor's ability to support day-to-day security issues, as well as common real-life events such as lost or stolen devices and when staff separates from your organization, is also not optional.			
Are the apps compatible with Mobile Device Management (MDM) software? Which ones?	If your organization uses or may use MDM, the vendor's apps must be compatible with it.			
Has the software passed third-party security reviews/ audits?	Third-party reviews/audits provide additional assurance of the vendor's claims.			
Does the vendor have service discontinuity and disaster recovery plans?	These types of plans minimize the impact on your organization if something extraordinary happens.			
To what extent is the system "open"? Is interface documentation publicly available? With what other vendors has this vendor successfully integrated?	Open standards and a track record of success with integration should give you confidence if you select a "best-in-class" mobile solution.			
What happens if data is collected on the mobile device that currently isn't stored on the back-end system?	Not all EMRs and back-office systems are ready to handle data that you know is useful at, or is added at, the point-of-care. Also, EMR and back-office vendors may not be able to keep up with your funders' changes. If the mobile solution can store data, your organization can be more agile.			
Does the mobile solution work with more than one back-office system or EMR at a time? What, if anything, is required if you decide to change a system that "touches" the mobile solution?	If the mobile solution can work with more than one back-office system or EMR, you have the ability to use the mobile solution across systems, and even change those systems, without disrupting operations. This is especially useful if you plan to work in partnership with other organizations, acquire other organizations, or may change EMRs and/or back-office systems in the future.			

# Professional Services Are the Key to Successful Adoption and Realizing Ongoing Value

When you choose a mobile solution, it will cause change in your organization and affect your business every day. A successful deployment will have a positive effect on many people and processes in the field and the office. Since mobile is a relatively new technology, and because the capabilities of mobile solutions are evolving rapidly, few organizations have extensive experience with all aspects of successfully deploying a mobile solution. As a result, the type and quality of the services provided by the vendor – both to get you up and running and to help you to realize value over time – are a critical part of your decision process.

Question	Why it Matters	Option #1	Option #2	Option #3
Does the vendor have a standard project plan for implementation? Is the plan structured around business outcomes? Does it fit your organization's needs? How long does the vendor say implementation will take?	Your odds of a successful adoption and realization of the full return on your investment go way up when the vendor has a proven implementation methodology and will develop a specific plan that meets your business needs.			
What is the vendor's experience with organizations that are similar to yours? How long did recent implementations take at those organizations?	Especially if you have a large organization or one that operates in a specialized field, your odds of success and meaningful ROI increase dramatically if the vendor has significant, highly relevant recent experience, and if key team members who did that work are available to work with you.			
What is the makeup of the implementation team? Does it include people with both technical and operating experience?	Successful adoption of a mobile solution involves a mix of people, process and technology. Does the vendor's staff cover all of those bases well?			
What services does the vendor provide for the technical and training aspects of implementation? Which are included and which are extra cost?	Technical and training capabilities vary from organization to organization, and, the availability of the right resources can vary, too. If you need – or think you might need – the vendor to do certain types of work for you, ask about the vendor's experience and willingness to do that type of work and what the fees will be.			
What training does the vendor provide for the field staff? The office staff? Is the training an "event" or is there an ongoing component?	To receive full value from a mobile solution, you need fast, high adoption in the field and the office. Most vendors provide some level of support for the implementation period. Outstanding vendors provide ongoing training, counsel and assistance to help you realize the most value.			

Question	Why it Matters	Option #1	Option #2	Option #3
Does the vendor provide any tools or reports for monitoring and managing adoption of the mobile solution? Which are included and which are extra cost?	Especially if you have a large organization, the ability to monitor adoption and quickly address issues is critical. Vendors who provide relevant reporting and analytical assistance throughout the adoption period can increase your odds of success.			
Does the vendor provide any best practices or services related to use of data for care delivery optimization? Which are included and which are extra cost?	The capabilities of mobile solutions, and each organization's experience with them, can vary. A vendor who provides best practices and assistance in using data to optimize care delivery greatly increases your odds of faster, more significant return and continual improvement in your operations.			
Does the vendor provide any best practices or services related to operational change management? Which are included and which are extra cost?	Starting in implementation, you may want to change some processes to take advantage of what mobile can do for you, or to eliminate steps that are no longer required. A vendor who can advise you on what you might do based on what others have done is a better partner for you.			
What does the vendor do when there is an update to its software?	Leading vendors periodically update their mobile solutions to add new capabilities and make other improvements. These changes may affect your operations. Finding a vendor with a track record of notifications, documentation of updates and training will help you to minimize disruptions and take advantage of new capabilities.			

## What Are the Commercial Arrangements?

All home care organizations face continual pressure to hold down their operating costs. That's why understanding the commercial arrangements is so important. Most mobile solutions include ongoing fees of some sort, but be wary of too much focus on that number. The questions in this section will help you to gain a broader perspective – including understanding total cost of ownership – and establish expectations about the return on your investment.

Question	Why it Matters	Option #1	Option #2	Option #3
Will the vendor provide an estimate of expected ROI?	Mobile solutions vary and, as a result, different ones provide different types of value to an organization. Vendors may be able to help you make a business case that is specific to their solution and your organization.			

Question	Why it Matters	Option #1	Option #2	Option #3
What is the structure of the vendor's pricing? Is there a set-up fee and ongoing fee? On what basis is the ongoing fee charged? Per user per month? Per visit? Are any other models available? Are hybrid models to support a mix of full-time, part-time and volunteer staff available? Is the price for the mobile solution contingent on continuing to use other products or services from that vendor?	Finding pricing that fits your business model and budget well is an important part of your ROI equation. Vendors who offer more options are typically able to meet your needs now and as your business evolves.			
What is included in the standard pricing? What is offered for an additional charge?	Your ROI equation can be affected by additional charges for features or services that are not part of your initial order. Understanding what is included and what is extra cost is important to understanding your total cost of ownership.			
How long is the term for a standard licensing agreement?	The length of your commitment may affect your pricing as well as your ability to make changes if needed.			
What are the additional costs, if any, related to the devices, data plans, etc., needed for a successful implementation?	You may incur some costs that are not paid to the mobile solution vendor that affect your decision process.			

## Will the Vendor be Good Long-Term Partner?

Because mobile solutions are a significant investment for home care organizations, and because those solutions affect operations every day, when you choose a vendor, you typically enter into a relatively long-term relationship. As a result, understanding the relative importance of the mobile solution you select in the context of the vendor's business provides the final piece of your decision-making puzzle.

Question	Why it Matters	Option #1	Option #2	Option #3
What percentage of the vendor's overall business (all products considered) is in your market segment today? What percentage of the total does the mobile solution represent?	Understanding the importance of your market segment and the mobile health solution to the vendor may provide perspective on the vendor's future support of your business and the solution.			

Question	Why it Matters	Option #1	Option #2	Option #3
What is the vendor's track record of releasing significant new capabilities for its mobile health solution? Does that track record extend to all caregiver types? To the management of that distributed work force?	The health care market is changing rapidly. Vendors who frequently bring new capabilities to market are more likely to provide you with the capabilities you need.			
What is the vendor's track record for responding to key technology shifts? Consider the advent of new technology (e.g., mobile vs. PC), shifts in operating system preference and operating system updates?	Technology continues to evolve rapidly. Vendors who have a track record of keeping up with changes in technology are likely to be better long-term partners.			
What are the vendor's current plans for ongoing development of the mobile solution? Is there an active, dedicated mobile-solution development team on staff?	The ability to provide a technically complex, industry-leading solution requires vision and execution. A vendor who is prepared to continually improve its full offering is likely to be a better partner for you than one with a "mobile-app-as-a-project" orientation.			

As you can see, there are many factors to consider when evaluating mobile health care solutions – from technical to financial to service and support. A top-tier solution can help you improve care outcomes, streamline operations, track and analyze performance, optimize your work force deployment, and much more. The best solution will also fit your budget and suit your current and future organizational goals. A solution only works for you if it works *with* you.

## About CellTrak

People receive exceptional health care in their home or community when their care providers use CellTrak's Mobile Health Solution. Home care, hospice and community care agencies in the US, Canada and the UK deliver higher quality care, communicate more effectively, improve compliance, reduce costs and increase productivity with CellTrak.

CellTrak's complete, integrated software-as-a-service solution facilitates care delivery and real-time field force management; automates data collection; and provides information for business and care optimization. All types of caregivers can benefit from CellTrak's solution, which includes apps that run on the leading mobile devices; portals for efficient, coordinated care delivery by a distributed workforce; interfaces to EHRs and back office systems; and services to support adoption and optimization.

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