



GIST CLIENT MANAGEMENT DATABASE

The Gist Client Management Database (GCMD) has been specifically designed for clinical service providers such as occupational therapists and speech-language pathologists. The database was originally constructed to meet the needs of assistive technology assessment services and is especially adept in this environment.

GCMD is focused on streamlining a service provider and reducing administration time and double-handling of information. Many of the day-to-day tasks of providing services are automated so that the number of hours necessary to service a client are reduced, and hence more clients can be assisted. The reduction of administration time frees up service provision staff to do what they are best at – providing clinical services.

GCMD features a number of modules as standard:

- Contact/Client Information
- Active Client Management
- Client Service Reports
- Timesheets
- Referrals
- Supplier Quotes
- Invoicing and Debtor Management
- Quoting
- Form Documents
- System Management

GCMD also offers an optional specialised assistive technology report module based on a modified SETT framework.

GCMD has an individualised password logon system so that client information and privacy is protected and actions undertaken by individual staff are automatically logged. Individualised shortcut menus are automatically loaded on startup.

GCMD is built within Microsoft Access and requires MS Access 2000 or later to run.

GCMD comes with comprehensive instructions designed for computer 'non-experts'.

Contact/Client Management

GCMD manages a wide range of client information. The main client management screen records the following client information:

- Full address details
- Demographic data – gender, ethnicity etc.
- Client contact people – doctor, caregiver etc.
- Client clinical notes
- Services previously accessed by client
- Services currently 'active' for client
- Current balances of time spent providing services to client
- Equipment provided to client
- Invoices history for client

The screenshot shows a software window titled 'Contact Information' for a client named 'A1 Wheelchairs'. The form includes fields for personal and contact details, a 'COPY ADDRESS' button, and a 'Group Membership' dropdown menu. At the bottom, there are navigation buttons: 'ADD', 'DELETE', 'FIND', and 'REFRESH'.

The client management screen also allows a full and customisable service history for the client to be shown, including all hours logged by staff, invoices, and approvals of hours.

Active Client Management

The image displays two overlapping software windows. The 'Active Clients' window shows a table of service balances for 'Joseph Aarts' and a 'Process' window showing a step-by-step list of service steps.

Service	KW1	KW2	App'l	Balance	Bal Rem
ACC / Assessment / Service Hours			0.00	-4.00	4.00
ACC / Assessment / Travel Hours				-6.00	
ACC / Assessment / Kms				400.00	
ACC / Resource Dev't / Service Hc			-10.00	-1.00	-9.00
ACC / Training / Service Hours			0.00	0.00	0.00

Step No	Description
0	Not yet commenced
1	Forms Returned
2	Appt Made
3	First Appt Done
4	Notes In
5	IR Sent
6	Exp. Updated

The Active Client Management screen shows information for clients currently receiving services. The screen shows the key staff workers for each active client, as well as 'approved' hours, hours spent assisting the client, and the balance of allotted hours remaining.

Each service (such as training for hospital clients) that is loaded into the system can be matched with a step by step process.

Active clients can then be tracked against these processes to show current status.

Current status information is updated weekly, and then is emailed to the referring or funding agency, directly from the database. This information is also logged against the client each week for the purposes of accountability and tracking.

Client Reports

The Client Service Reports screen is used to print summary reports drawn from client clinical notes.

Each client note recorded within the set date range is included in the report, unless noted in the system as an 'internal' note only.

The Service Report provides a useful feedback tool for referring or funding agencies where a full narrative report is not required.

Timesheets

Service	App'l	Balance	Bal Rem
ACC / Assessment / Service Hours	0.00	-4.00	4.00
ACC / Assessment / Travel Hours		-6.00	
ACC / Assessment / Kms		-400.00	
ACC / Resource Dev't / Service Ho	-10.00	-1.00	-9.00
ACC / Tricia / Service Hours	0.00	0.00	

The Timesheets screen allows staff to log time against clients on a weekly basis. Staff can be set a 'chargeable hours' goal as a target for client-related work. The Timesheets screen also monitors lieu, sick and holiday leave. Staff are able to print a graph of chargeable hours performance over time to self-monitor productivity.

Referrals

The Referrals screen manages inward client referrals. As well as recording funder and referrer details, the Referrals screen notes the number of 'hours' that have been approved for the client, whether this is fixed or not.

The system also records details of client appointments and forwards these by email to both the referring agency and the key staff workers.

Supplier Quotes

The Supplier Quotes screen manages the quoting and ordering of equipment on behalf of clients. The system closely monitors each step in the process, including quote request, receipt of quote, order, equipment receipt, set-up and delivery.

The system emails relevant staff as each step in the process is reached.

Invoicing and Debtor Management

Invoices

Inv Lookup: 3: 18/02/2005: Joseph Aarts: ACC / Assessment

Inv No: 3 Ref Code: ACC Ref Desc: Assessment

Date: 18/02/2005 Payer: ACC Elenheim

Client: Aarts, Joseph Attn: Brian Walters

Notes:

Service	Rate	Units	Amt	Total
ACC / Assessment / Kms	\$0.65	km	400.00	260.00

GST Exc: 260.00 GST: 32.50 GST Inc: 292.50

Invoice Envelope

FILE NOTE PDF ADD DELETE FIND REFRESH

Service Current Balances

Service	App'vl	Balance	Bal Rem
ACC / Assessment / Service Hours	0.00	-4.00	4.00
ACC / Assessment / Travel Hours		-6.00	
ACC / Assessment / Kms		-400.00	
ACC / Resource Dev't / Service Ho	-10.00	-1.00	-9.00
ACC / Training / Service Hours	0.00	0.00	

Standard Items

Service:

Description: Rate: Units: Amt:

ADD ANOTHER CLOSE

The Invoicing screen allows invoices for work done to be forwarded to the client's funding agency. The resulting invoice can be printed and sent to the funder or emailed as a PDF document. GCMD also includes a full debtor management system to check which invoices are outstanding, ranked in 'age' order. The system can also automatically print 'overdue' letters to be sent to funders.

Quoting

Quotes

Quote Lookup: 1: 5/02/2005: Joseph Aarts: ENA / Training

Quote No: 1 Ref Code: ENA Ref Desc: Training

Date: 5/02/2005 Payer: ACC New Plymouth

Client: Aarts, Joseph Attn: Kathie Third

Notes: This is a test note

Service	Rate	Units	Amt	Total
ACC / Assessment / Service Hours	\$100.00	hour	0.00	0.00
ENA / Technical Support / Service Hours	\$100.00	hour	0.00	0.00
ENA / Technical Support / Service Hours	\$100.00	hour	2.00	200.00
ENA / Training / Service Hours	\$100.00	hour	14.00	1,400.00
ENA / Training / Travel Hours	\$50.00	hour	5.00	250.00

GST Exc: 3,450.00 GST: 431.25 GST Inc: 3,881.25

Invoice Envelope

PDF ADD DELETE FIND REFRESH

Standard Items

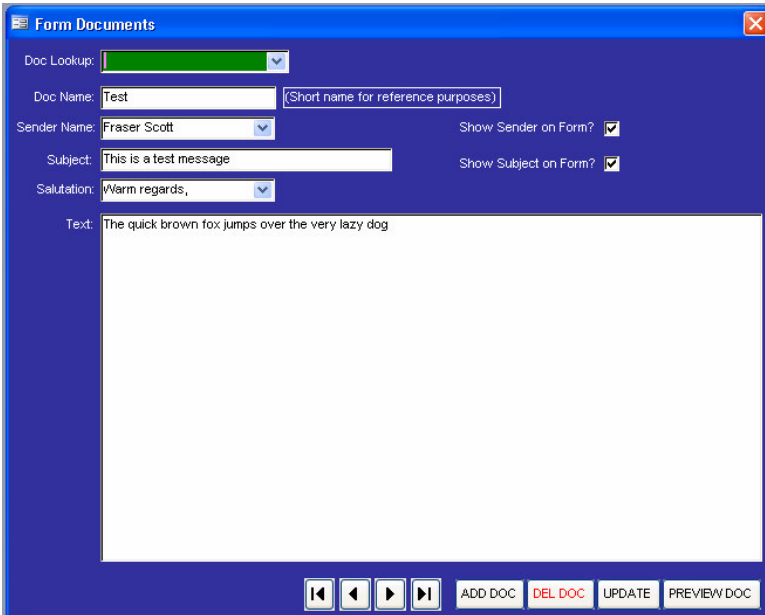
Service:

Description: Rate: Units: Amt:

ADD ANOTHER CLOSE

The Quotes screen allows preparation of quotes for funding or referring agencies.

Form Documents



The Form Documents screen allows the preparation of form letters, such as a mail-out to funding agencies or clients.

The documents can be sent to any defined group, or to selected contacts from the database.

System Maintenance



The System Maintenance menu allows for the full customisation of the database. From entering all the details of the database 'Owner' (including logo image which can be added to printed documents) to Services details to Staff information.

The System Maintenance menu is extremely comprehensive and allows the database to be customised simply to the needs of the organisation using it.

Assistive Technology Report

The screenshot shows a software window titled 'Assessment Reports' with a sub-header 'Joseph Aarts: Full Report'. The interface is organized into several sections:

- REASONS FOR ASSESSMENT REVIEW:** A table with a header 'Assessment conducted in response to the following questions' and three rows of placeholder text.
- NEEDS AND DESIRED OUTCOMES:** A table with a header 'Need/Outcome as Identified by Team' and columns for 'App?', 'Rst?', 'Ess?', and 'Agr?'. It contains two rows of placeholder text with checkboxes.
- HOW ARE THESE NEEDS CURRENTLY MET?:** A table with a header 'Other Tools/support Client has:' and columns for 'Used?' and 'How Assessed'. It contains two rows of placeholder text with checkboxes.
- TASKS TO BE PERFORMED BY CLIENT:** A table with a header 'Task' and one row of placeholder text.

At the bottom of the window, there are navigation buttons: 'ADD', 'DELETE', 'FIND', and 'REFRESH'.

The optional Assistive Technology module automates the process of producing assistive technology reports, and can cut report-writing time by up to a half, while enhancing quality, accuracy and consistency in report preparation.

The module includes an Interim Report (completed part-way through an assessment to update the referring agency), Review Report (where an existing assistive technology implementation is reviewed, rather than a complete assessment being undertaken), as well as a Full Assistive Technology Report.

The full report includes the following sections:

- Executive Summary
- Assessment Team & Report Recipients
- Reasons for Assessment
- Needs and Desired Outcomes
- How are these Needs Currently Met?
- Tasks to be Performed by Client
- Assessment of Skills
- Client Ownership Comments
- Potential Barriers to Success
- Equipment Trialled
- Trial Goals
- Observations re: Trial Feedback Quality
- Observations re: Client Support Team
- Recommended Equipment Options
- Recommended Training/Service Options
- Success Pre-requisites
- Initial Training Plan
- Medium-Term Goals
- Ongoing Challenges
- Ongoing Services Options
- Hardware and Software SETT Tables

Pricing

GCMD is available in two ways:

- *Purchase*: GCMD can be purchased outright for \$3,000 plus \$500 for the optional Assistive Technology Report module
- *Lease*: GCMD can be leased for \$200 per month or \$230 per month including the optional Assistive Technology Report module. Leases are for a minimum of 24 months.

For more information contact fraser@gistcommunications.co.nz