



SIHATA CARE

NOVEMBER 2024



NEW DEMANDS OF PERSON-DIRECTED FUNDING DRIVE AGENCIES TO RETHINK SERVICE DELIVERY

Brantwood Community Services
Case Study



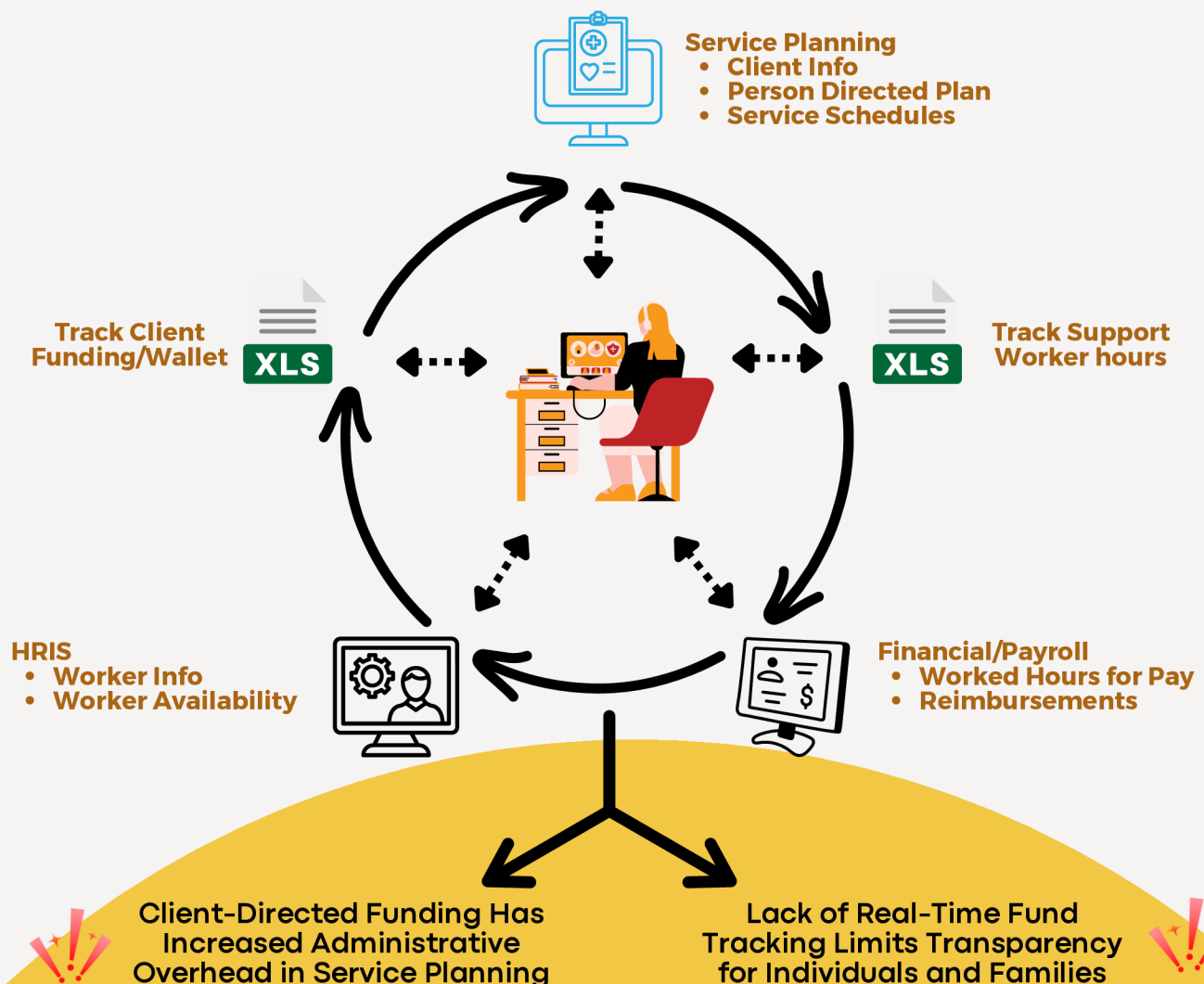
ADAPTING TO PERSON-DIRECTED FUNDING


A Critical Change in How Agencies Enable Choice and Deliver Care

Brantwood Community Services has been a pillar of support for individuals with developmental disabilities for over a century. Known for its person-centred approach, the organization continues to offer individualized programs and supports.

As funding models shift towards a more person-directed system, new challenges arise in service coordination, financial management, and workforce operations. Numerous applications and spreadsheets have emerged to track client funding and worker hours. Service coordinators need data from these systems, including HRIS and service planning applications, to empower client choice effectively. Additionally, this information must flow seamlessly back into the payroll system to ensure proper worker compensation.

Managing this complex web of data created significant challenges for agencies to maintain efficiency and transparency while delivering quality care.





To keep **advancing choice and inclusion**, we needed to navigate the shift of person-direct funding to a single-platform solution of Service Planning and Workforce Management

Addressing Team Needs



Service Coordinator

- Integrated budgeting and service planning tools
- Real-time tracking of planned, used vs. unused person-directed funds
- Effective resource deployment of mobile workforce and on-site assets



Support Worker

- Real-time visibility to person-directed plans for their caseload
- Real-time visibility of work schedule
- Strengthen communication with support staff



Finance Manager

- Accurate tracking of client fund(s) usage to maintain proper billing and financial reconciliation
- Simplify reporting to meet third-party agency requirements
- Track support worker hours and related expenses



BUDGET, PLAN, ADAPT: DIGITAL TOOLS THAT UNLOCK CHOICE FOR EVERY PERSON



Eliminated
10 hours of
admin
duites per
week

For service coordinators onboarding an individual begins with setting up their budget and funding allotments. The platform simplifies this process by allowing coordinators to organize multiple funding sources and allocations on a weekly, bi-weekly, monthly, or even quarterly schedule.

Once the budget is established, coordinators can seamlessly start the service planning process. For each event planned on an individual's schedule, there is real-time visibility of planned, unplanned and used funds to assist coordinators to confidently design flexible person directed care plans that optimize funding while aligning with the individual's long-term goals.



Budgeting Tools

Set allocation details for each funding source

Edit funding source

FUNDING AGENCY: OH Funded | FUNDING PROGRAM: Passport 920

☒ Funding allocation required
Units allocation is required

ALLOCATION TYPE: Budgeted | STARTING: 2024-05-07 | ENDING: 2024-12-31

BUDGET: 18000 | UNIT OF SERVICE: Amount | TRACK: Weekly

Add & prioritize multiple funding sources by service

Funding Sources [Add funding source](#)

Individualized	24.00hour(s) this week, 0.50hour(s) serviced	Allocations Edit
Jennifer Smith - Private	600.00CAD this week, 200.00CAD serviced	Allocations Edit
Passport 921	40.00hour(s) this week, 0.25hour(s) serviced	Allocations Edit

Service Planning Tools

Automated drawdown of funding for each new event created

New Event

DEPARTMENT: Community Connections

SERVICE: Abilities Centre | SERVICE ITEM: Abilities Centre Visit

START DATE: 2024-11-20 | START TIME: 05:00 PM | UNITS IN HOURS: 1 | END TIME: 06:00 PM

☐ Recurring

PATIENT: 1000 - pat: 1000, Jan, name

FUNDING: Passport 921 - Remaining Units: 39.75 hour(s)

Funded 803 - Remaining Units: 23.5 hour(s)

Passport 920 - Remaining Units: 400 CAD

Jenny Smith - Remaining Units: 9 hour(s)

Jackson Wilson - Allocation not required

Auto allocation allowed

Individual schedules with details of resources required and support worker assignment

Schedule

Sun 17	Mon 18	Tue 19
10:45 - 11:30, 0.75hour(s) Group Support Unassigned	08:00 - 13:00, 5hour(s) Individual Support Alp, name emp 101	16:00 - 16:15, 0.25hour(s) Abilities Centre Visit Unassigned
	09:00 - 09:00, 1hour(s) Library Alp, name emp 101	17:15 - 17:30, 0.25hour(s) Abilities Centre Visit Unassigned
	09:00 - 11:00, 2hour(s) Grocery Alp, name emp 101	
	09:00 - 09:30, 0.5hour(s) Grocery Alp, name emp 101	
	16:00 - 16:15, 0.25hour(s) Abilities Centre Visit Unassigned	
	17:15 - 17:30, 0.25hour(s) Abilities Centre Visit Unassigned	

DELIVER EXCEPTIONAL EXPERIENCES FOR SUPPORT WORKERS



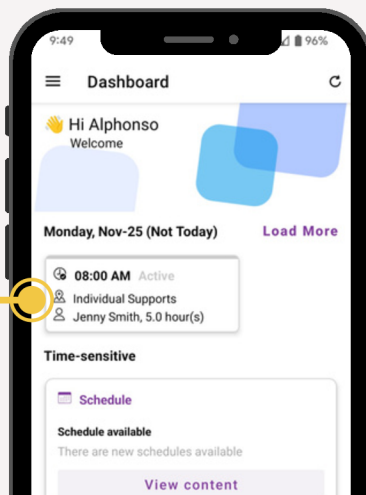
Improved
Staff
Satisfaction

Direct support workers were provided intuitive tools that provide all the information needed for exceptional service experience. The mobile app equips workers with detailed Person-Directed Plans, which outline individualized goals, preferences, and specific Activities of Daily Living (ADLs) to be delivered. Whether it's assistance with mobility, meal preparation, or personal care, these plans ensure workers have clear guidance tailored to the individual's needs.

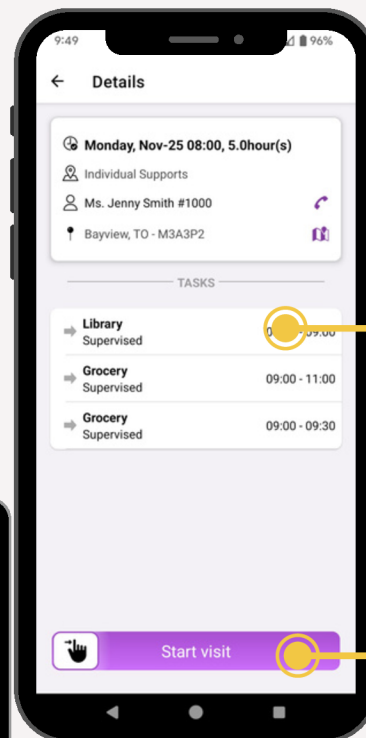


Additionally, the built-in visit verification system automates the tracking of service hours, eliminating manual timekeeping. This not only ensures compliance with funding requirements but also allows workers to focus on delivering meaningful, personalized support.

Dynamic
schedules with
visit details
and real-time
alerts for last-
minute
changes

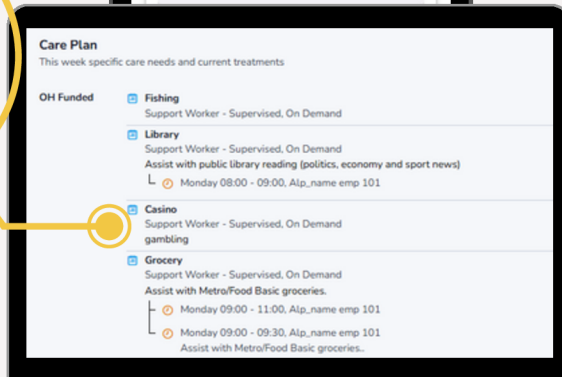


Track
individualized
ADLs required
for each visit



Timestamp
and geo
location based
visit verification

Person Directed
Plans available
via mobile app
and web



TRANSPARENCY OF PERSON-DIRECTED FUNDS REQUIRES AN INTEGRATED APPROACH



Real Time
Funding
Usage
Visibility

Finance managers gained unparalleled visibility over individualized, person-directed funding through comprehensive tracking tools, made possible by our single platform of service planning and workforce management. By capturing all data points across the complete workflow—from onboarding, budget setup, service delivery and visit verification—the platform ensures that no detail is missed.

This centralized system consolidates financial data across all programs, services, workers, and individuals, providing a single source of truth for funding management. With real-time insights into allocations and expenditures, finance teams can streamline reporting, ensure accurate fund utilization, and maintain accountability. This holistic approach empowers Brantwood to confidently navigate the complexities of person-directed funding while delivering equitable, exceptional care.



Real Time Visibility of Funding Usage

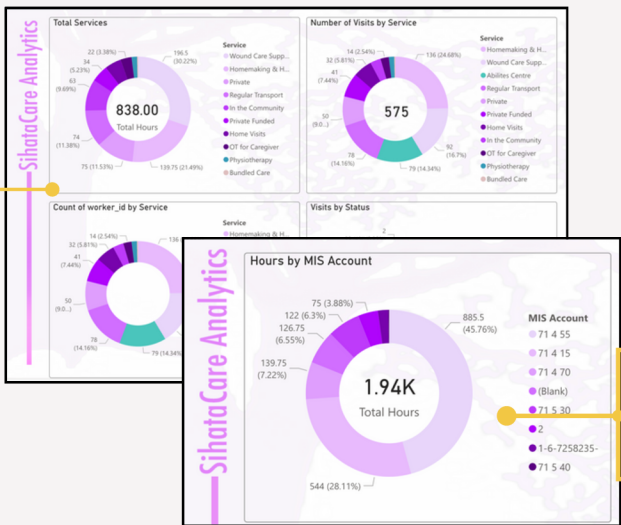
Control your budget limits with weekly/monthly/quarterly cadences

Passport 920 - Funding Allocation						
May 07, 2024 - Dec 31, 2024. Weekly tracking						
Budgeted: 18000.00CAD, Unallocated: 1800.00CAD						
Allocate units						
Begin	End	Units	Serviced	Cancelled	Missed	Status
2024-12-29	2024-12-31	600.00	200.00	0.00	0.00	N/A
2024-12-22	2024-12-28	600.00	200.00	0.00	0.00	N/A
2024-12-15	2024-12-21	600.00	200.00	0.00	0.00	N/A
2024-12-08	2024-12-14	600.00	200.00	0.00	0.00	N/A

Weekly breakdown of funds used, serviced, cancelled, missed

Support Worker Payroll and Expense Tracking

Automatically track travel time and distance



Multiple data views using Power BI for workforce operational and financial reporting

Our digital platform: **Designed to create community for every individual, built for agencies**



"Sihata Care has been an incredible partner in our digital transformation journey. Their team provided unwavering support, guiding us every step of the way with expertise and patience. They truly understood our unique needs and helped us implement a system that empowers both our team and the individuals we serve. The experience has been seamless, and we're excited about how this change is helping us deliver even more impactful, person-centered care."

-Tracy Humphrey, Director of Services

www.sihatacare.com

