Connecting | Confirming | Caring
how Certa supports the delivery of outstanding care services

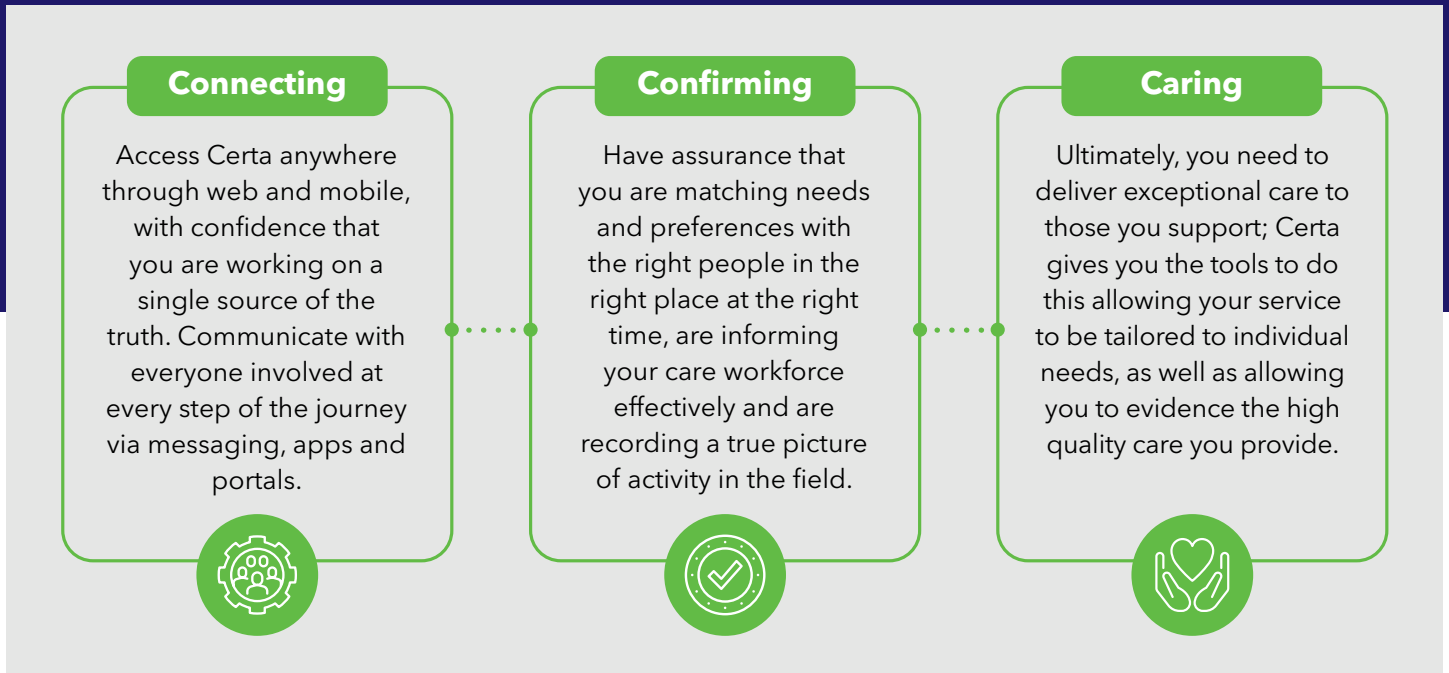## Your complete care management software solution

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What is Certa?

Certa is a complete care management software solution designed for care providers. It supports the planning, delivery and management of outstanding care services with functionality across care planning, rostering and financial management. Put those you support first with smart tools to deliver person-centred care planning, whilst removing paper from your service with Certa's digital care records. Personalise your rostering using advanced matching rules and optimisation to deliver care worker schedules through a mobile app. Record timesheets automatically to drive accurate pay and billing processes. Understand and react to service activity with Certa's dashboards and alerting. Evidence your quality statements with Certa's real-time reporting.

Connecting

Access Certa anywhere through web and mobile, with confidence that you are working on a single source of the truth. Communicate with everyone involved at every step of the journey via messaging, apps and portals.

Confirming

Have assurance that you are matching needs and preferences with the right people in the right place at the right time, are informing your care workforce effectively and are recording a true picture of activity in the field.

Caring

Ultimately, you need to deliver exceptional care to those you support; Certa gives you the tools to do this allowing your service to be tailored to individual needs, as well as allowing you to evidence the high quality care you provide.

Who benefits from Certa?

Clients
Benefit from a fantastic, responsive service that is mindful of their needs, delivers when expected and allows easy interaction as necessary to achieve wellbeing.

Care workers
Spend less time on admin and more time delivering exceptional care with tools that inform, support and protect their work.

Schedulers/Administrators
Update records and match clients and care workers optimally and efficiently, whilst reacting to exceptions and alerts in an informed and responsive manner.

Managers
Connect with all service stakeholders, gain insight into every area of your organisation, make decisions based on fact, be confident with your finances and evidence high quality services.

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Certa's core functionality

Portal
Enable clients and their friends and family to interact with your service whilst staying informed

Planning
Easily create person-centred care plans that capture everything needed to ensure a highly personalised service

Reporting
Gain insight across every aspect of your service with in-built reporting tools

Rostering
Match visit plans to care workers optimally and handle exceptions confidently

Finance
Have confidence that your care worker pay and funder billing is accurate

Care worker app
Publish a dynamic roster, capture visit data in real time and enhance lone worker safety with intouch

1. Care planning – personal and accurate

With Certa you can put your clients first with tailored, person-centred care planning that considers their bespoke needs. Certa takes your care planning digital, allowing what matters to a recipient of care to be understood and acted upon. Assessments, care notes and medication records are easily recorded and updated in Certa, allowing all interactions to be personal and informed.

Features

- Accurate, digital recording of client data using standard forms and assessments
- An About Me profile to capture needs and preferences
- eMAR medication management with real-time client updates captured and recorded, plus integration to the NHS Medicines API for accurate medicine information

Benefits

- Person-centred care planning defining everything you need to know about a client's care
- Deliver and record the right medication at the right time
- Trust that your care planning information is accurate and up to date at all times
- No reliance on paper records
- A clear audit trail of care planning to allow progression and trends to be understood

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2. **Rostering** – the right people in the right place at the right time

Certa enables you to easily create visit plans based on need and preference, then allocate care workers based on factors such as continuity, availability, skills, proximity and contracted hours. User-friendly tools such as 'drag and drop' and 'point and hover' on a wallchart view, give the best possible experience for your schedulers.

Certa automatically builds accurate travel time and property access time into your schedule using a unique travel-time matrix. The rules-based optimisation engine can create the best match for a schedule across your service. Certa also helps you stay compliant by warning or preventing matches that should not take place, such as no valid DBS check or not possessing the mandatory skills required for the visit. Schedules are automatically pushed to care workers' mobile apps.

| Features	Benefits
• Create detailed and personal visit and task plans for each client	• Model service demand based on client need
• Use cyclical visit plan creation, including auto-generation of future visits and pause/resumption/termination functionality	• Matching considers continuity of care for client piece of mind
• Certa's wallchart view provides an intuitive, graphical timeline view of all your events	• Rules prevent or warn against non-compliant matches
• Match and allocate care workers to visits using intuitive tools and rules	• Reduce cost by considering availability and contracted hours first when scheduling
• Automatically calculate travel time for care workers between visits using Certa's travel time modelling	• Reduce unnecessary travel time for care workers by scheduling efficient visit routes
• Automate allocation with Certa's 'best fit allocation' feature	• Reduce the administrative burden in assigning care workers to shifts
• Easily allocate non-contact events such as absence and training and prevent visit allocation during these times	• Understand care worker progress in real time
• Receive instant notifications and alerts if a care worker hasn't signed on for the day, is running late or is in trouble	• Reduce the likelihood and impact of missed visits
	• Stay connected with your care workers to give them support, updates and confidence in the field
	• Easily handle exceptions to keep your services on track

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3. Care worker app - keeping your workforce connected

Integral to Certa is the intouch mobile app, designed by carers for carers. Certa communicates in real-time with intouch, delivering a care worker's latest schedule to their mobile. This includes key information about the client and the specific tasks required for any visit. Task and outcomes details, notes and messages can all be captured at the point of care, which automatically feedback to Certa and update relevant care records as well as electronically monitoring start and end times of visits.

intouch also keeps your care workers safe in the field, operating as a lone worker safety tool. A panic button is present throughout the app which immediately alerts the Certa back office if activated so that appropriate action can be taken.
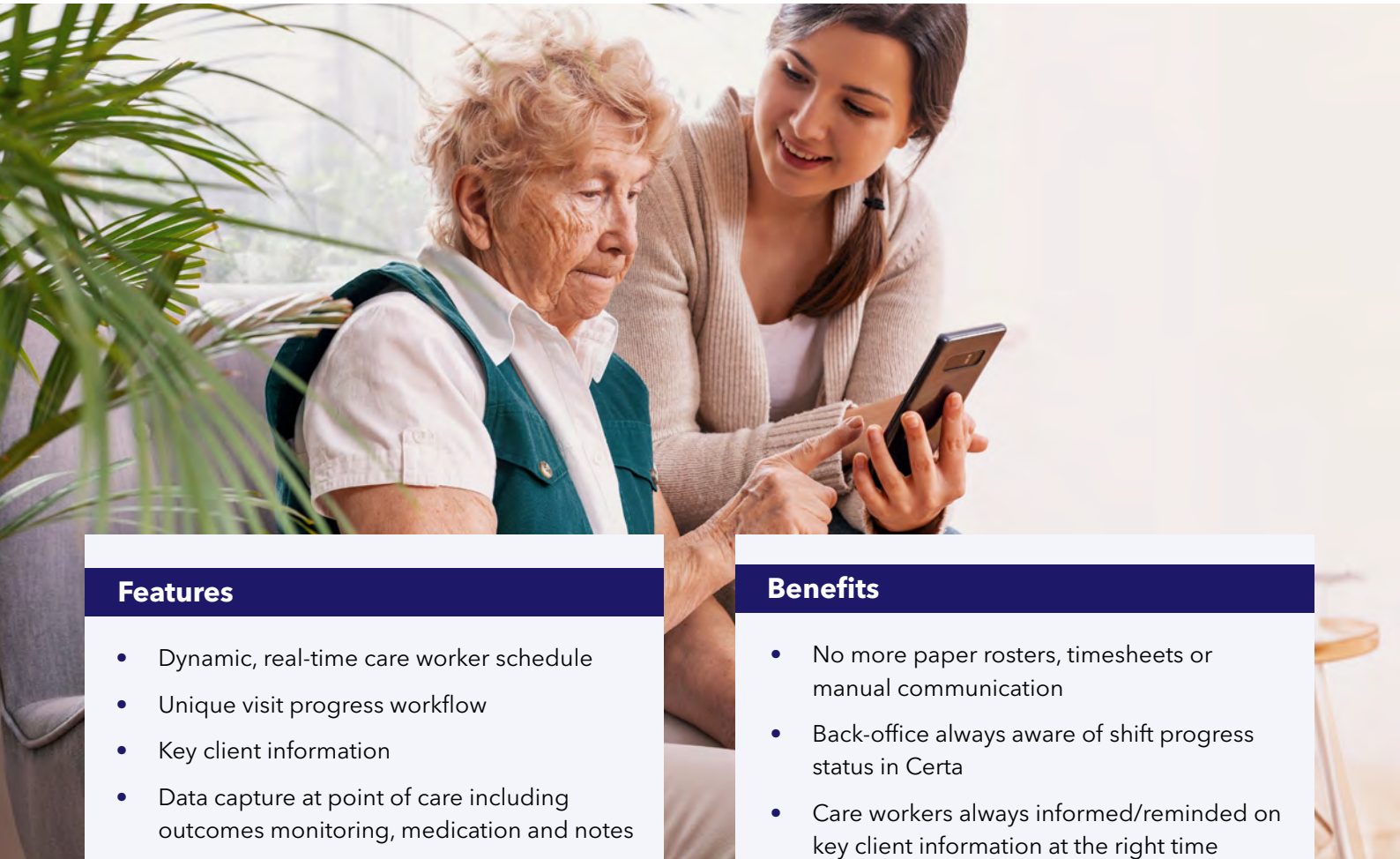
Features

- Dynamic, real-time care worker schedule
- Unique visit progress workflow
- Key client information
- Data capture at point of care including outcomes monitoring, medication and notes
- Discreet visit verification using NFC scanning
- Message inbox
- Panic button for lone worker protection
- Automatic offline working when a mobile device is out of signal
- Roster changes acknowledgement
- Available on Android and iOS
- Encrypted, multi-factor authentication
- Welsh language option
- Mileage claim option

Benefits

- No more paper rosters, timesheets or manual communication
- Back-office always aware of shift progress status in Certa
- Care workers always informed/reminded on key client information at the right time
- Capture client data in real-time to keep care records and visit information up to date
- Ensure proof of delivery
- Care workers can keep working when out of signal with no loss of quality or effectiveness
- Care workers feel safe and supported when working remotely
- Communicate instantly with your workforce individually or as a group
- Know if a care worker is behind with their schedule

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4. Finance – make managing your finances easy

Be confident that your care worker pay and funder billing is accurate with Certa's detailed financial tools. Certa's care worker timesheet module automatically reads actuals from visit data, meaning you will always have an accurate record of exactly what has happened. Certa also splits out timesheet lines by contact and non-contact time (including any absence events) as well as automatically creating travel-time lines, so understanding who did what, where, when is clear.

Authorisation of timesheet lines allows them to be processed for pay and charging. Map the most complex of pay rules and conditions to define rules-based period end processing. Analyse care workers up-to-gross pay then extract time and expenses data for staff pay. Use the same timesheet lines to apply charging rules and conditions then extract time and expenses data for funder billing.

With your business and financial rules built into Certa, you can be confident that you're producing accurate payment and billing information, with a reduced risk of human error. This reduces the time spent calculating or querying pay and billing and improves accuracy and consistency, resulting in a more effective and efficient process.

Features

- Staff timesheet and expenses functionality automatically created from operational data
- Timesheet authorisation allows managerial approval of activity before it's committed to pay or charge
- Pay calculator
- Charging functionality
- User definable pay periods to align with your organisation
- Timesheets are locked from editing once pay calculation has been processed
- Export financial records as .csv files

Benefits

- Reduced administrative time to create timesheets and ensure accuracy
- Easy analysis of time spent on care, travel and non-contact activity
- Ensure complex pay rules match your staff terms
- Ensure timely and accurate bills are sent to funders based on agreed contractual terms
- Ensure client incurred expenses are reimbursed to staff and/or recharged to funders as agreed
- Remove human error in complex calculations
- Have confidence when resolving financial queries
- A financial audit of all transactions

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5. Reporting - robust operational insights

Bring insight to your operation with Certa's inbuilt reporting tools. Certa's dashboards give you analysis across your service, from visualisation of client demand to planned vs actual analysis and medication details. Find useful Certa reports which can be output to common formats, including Excel and .csv, as required against every functional area in the software.

Be confident you have everything you need for the CQC with Certa's SAF-aligned reporting suite, giving you the evidence you need to meet quality statements.

Edit and build your own reports on your data in Certa with the user-friendly reporting tool, or query online with your favourite third-party tool.

Features
• Preconfigured dashboards and standard reports available out of the box
• Standard reports include clients, staff, organisations, addresses, jobs, events, audit trails, outcomes monitoring, medication administration and client timelines
• Flexible reporting outputs
• A suite of CQC reports provide information evidencing SAF quality statements
• Additional graphical dashboards and reports can be created against any of your data by CACI on request

Benefits
• Gain insight into every area of your business
• Visualise all interactions with clients, identifying patterns and taking actions where necessary
• Be confident in evidencing CQC quality statements
• Standard reports for subject access requests and support with GDPR compliance
• Provide exceptional care by assessing care delivery from a holistic, caring viewpoint

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6. Portal - make your services transparent

Let those you care for, their family and loved ones be fully aware of your service and give them the opportunity to feedback and interact with you using the Certa portal. Certa's portal is a fully secure, consent-only website that provides users with key service details in relation to someone being cared for.

Let users see what care has been delivered by whom, including notes and updates and care worker comments, by publishing data directly from Certa. Publish a forward schedule of upcoming visits to give peace of mind on a care worker's next arrival. Use the portal messaging feature to enable clients, their friends and family to communicate with you, allowing feedback, issues, compliments and suggestions to be recorded, considered and actioned accordingly.

Features

- Authorised users can leave messages for your service

- Two-way messaging enables clear and transparent communications

- Next planned visit is clearly visible to everyone, as well as a calendar of recent and upcoming visits

- Separate, secure login is provided for each client

- A transparent history of visits and care provided

- Send messages via the portal about anything pertaining to a client's care

- All care information can be updated in the portal in real time

Benefits

- Real-time visibility of care visits for clients and their loved ones

- Accurate planned and actual care delivery made transparent to everyone

- Clients, their friends and family can easily communicate with you

- Receive additional care details relating to a client that can be actioned in your service to enhance person-centred care

- Reassure client stakeholders about the provision of care of their loved ones

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## 7. Support and compliance – ensuring your ongoing success

Additionally, Certa features aspects to aid with the technical support, integration and compliance of your service delivery. These are designed to keep your data safe, ensure that Certa is always available and to help you comply with security and data regulations.

Features

- As a SaaS solution, Certa is fully managed by CACI

- Certa uses AWS public cloud, delivering 99.9% uptime, 24/7, 365 days a year

- AWS monitoring tools are used to continuously monitor, detect and protect against unusual activity and attacks

- Certa features a public API for integration with other systems

- Certa is WCAG 2.1 AA compliant

- All Certa customer data is securely segregated, meaning your organisation's data cannot be accessed by anyone unauthorised

- CACI is an ISO27001 and Cyber Essentials+ certified organisation

Benefits

- Peace of mind that Certa will be available when you need it

- Peace of mind in complying with data and security regulations such as GDPR

- Certa works with your other software, helping you deliver joined up services

- Certa is designed so that you can be up and running quickly; from implementation to training, you'll be up and running in the timeframe you need

- All security patches and system maintenance are taken care of for you by CACI

- CACI is committed to the care market and the ongoing development of Certa
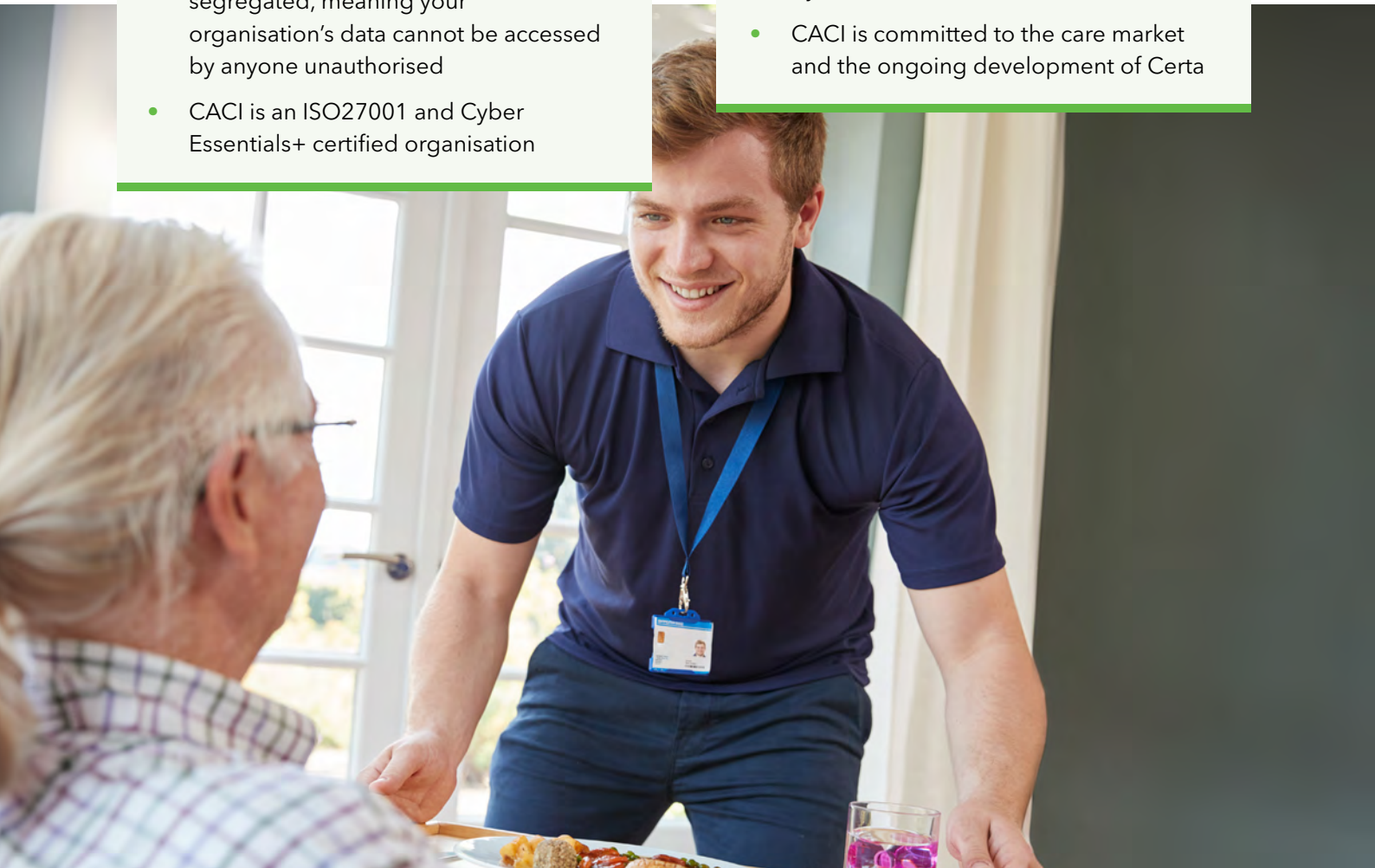
The team behind Certa

Certa is fully supported by CACI. With over 25 years of experience in the sector, our service desk and web support system are on hand to ensure your success with the system, as well as provide helpful and friendly advice and information sharing. Many of CACI's team have previously worked directly in the care sector and care about your service quality as much as you do. Talk to us to find out how Certa can help you run the service you want.

For more information, please visit **www.caci.co.uk/certa**

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