The Ultimate Senior Living Software

By Pam McDonald

In the mid-90s I was helping a small senior living company market its four communities. Each building had an onsite community relations director, which is what they were typically called in those days since "sales and marketing" seemed too ruthless and crass.

This company kept their prospect data on 3x5 index cards in recipe boxes. But, the owner was an innovator and really liked technology. Despite the fact that computer software kind of terrorizes me, he tasked me with finding software to replace their quaint and really inefficient method.

Senior Living Software: The Early Days

He decided on an internet-based CRM specifically for senior living. It was so easy to use; with a bit of typing and a click of a mouse here, and a push of a button there, users could keep track of tons of searchable information about inquiries and referral sources.

And, with just a few choices, staff could instantly produce really useful reports from a variety of built-in templates; eliminating the hours of work that had been required each week to construct these manually.

Within a few years, this owner had his caregivers tracking services on handheld devices. Unfortunately, he was way far ahead of the curve and that particular vendor was not commercially successful. It was several more years before he was able to re-introduce point-of-care services tracking to his operations.

Today's Ultimate Software

I was reminded of the stop-and-start development of senior living software recently while being introduced to the Senior Living Software Solution by [MatrixCare®](#), a Senior Housing Forum partner. This purpose-built, tightly integrated program has massive functionality. The following is the lowdown on its three core components.

Resident Care Management

The Resident Care Management software provides tools to accurately assess resident needs. It automatically creates detailed Service Plans, and is used to document delivered care and bill accordingly.

The program allows communities to schedule, track and analyze assessments, and it automatically revises charges when assessment levels change. These reports are customizable to meet the varying requirements of different states providers.

The program also can document and track resident and employee-related incidents so risk factors can be addressed proactively.

Marketing

With MatrixCare's CRM, users can manage all their leads – from initial inquiry to move-in – and track them through predefined marketing outreach approaches. The program automatically pulls inquiries in from the company's website as well as other third-party sites. Leads can be managed for multiple facilities or organizations in one central location.

Occupancy and vacancy data can be accessed in real-time. Standard reports as well as user-defined dashboards allow monitoring of sales performance and analysis of marketing activities to determine what's working. Users can track costs per lead and assess lead sources. Additionally metrics can be viewed anytime from a variety of devices when there is browser and internet access.

Financial and Operations Management

This component of MatrixCare's Senior Living Software Solution lets users administer operations with precision and in real-time. There are tools for budgeting, billing, census, accounting, payables, human resources, and move-ins/move-outs – all of which can be tailored for individual communities.

Real-time budgets vs. actual revenues and expenses can be tracked and analyzed. Built-in dashboards provide access to actionable data at a glance to guide proactive decision-making. And the work flows and approval processes are customizable. The program also can automate Medicaid billing and manage vendors' accounts payable.

Its real-time census, vacancy and occupancy information – including physical and financial occupancy by beds and/or units – helps managers keep their communities full and makes move-in and move-out easier on residents and their families.

At this point, I need to quote the Ginsu knife commercial, "But wait . . . there's much much more." Because yes, there's lots more this software solution can do to streamline and improve senior living operations.