

Solution Discovery Report

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- 1. Overview 3
- 2. Current Solution Shortcomings..... 5
- 3. New Solution Requirements 6
- 4. Basic Application Features 7
- 5. Possible Solution Candidates 10
- 6. Eliminate prospects which do not meet minimum criteria 11
- 7. Filter candidate list based on additional impacting factors..... 12
- 8. Review and identify key pros and cons..... 14
 - 8.1. Microsoft Dynamics CRM - Health and Social Services..... 14
 - 8.2. i-SocialCare..... 16
 - 8.3. Custom Developed Application..... 18
- 9. Summary 19
- 10. Recommendations 20

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Solution Discovery Report



1. Overview

Client: Swan Foundation for Community Living
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Project Goal: Investigate and provide alternative solutions to current Information Management System (customized FileMaker Pro) software.

Project Background: Operating for over two decades, the Swan Foundation exists to meet the unique requirements of multiply disabled children with complex medical needs. Due to a widening disconnect between their own needs and the capabilities of their current IMS, the client must transition to a more capable solution.

The primary objective of this project is to aid the client in acquiring the most appropriate solution available. The selection process will be based on a variety of factors including internal and external requirements, feature availability, ease-of-use, cost, transition effort required, learning curve involved, and implementation time frame.

Recommended solutions may include migrating to alternative software, developing new custom desktop software, developing new online software or a combination of offerings. To accomplish this goal, we have proceeded along the following steps:

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1. Identify key requirements of the new solution
2. Compile open list of possible solution candidates
3. Eliminate prospects which do not meet minimum criteria
4. Further filter candidate list based on additional impacting factors (if required)
5. Identify remaining qualified candidates
6. Review each solution and identify key pros and cons
7. Summarize findings
8. Make recommendations

2. Current Solution Shortcomings

The following items have been identified as having a detrimental impact on the current solution in use as well as hampering any individual processes dependent upon the solution:

- Tenuous relationship with consultant to provide updates and maintenance on a regular, ongoing basis
- Inadequate reporting features with narrow search criteria
- Clumsy user interface
- Limited access to internal users only
- Minimal support available due to age of application
- Little to no flexibility to incorporate new features
- Inability to provide permission-specific access and features
- Lack of user history logs to provide accountability
- Unable to integrate with third-party applications where required

3. New Solution Requirements

The following items have been identified as being required in the new solution to ensure that the client is able to perform their duties in the most efficient manner possible and receive the greatest amount of return on investment:

- When and where required, the ability to synchronize/interface with
 - QuickBooks (finance, donations)
 - Ceridian (finance)
 - MS Outlook (contact management)

- Must be accessible to
 - 5+ locations
 - 100+ employees
 - Website visitors (parents) requesting respite bookings

- Must be secure
 - Storing credit card information
 - Individual User accounts with role-related permissions
 - User accountability via history and action logs

- Must be able to manage information
 - All facets of employee records
 - All facets of respite programs
 - All facets of contacts management
 - All facets of property management
 - Storage and sharing of documents

- Must be able to generate and print
 - Comprehensive reports
 - Mailing lists based on user defined credentials
 - Tax receipts
 - Email communications and newsletters

- Must be adaptable and user friendly
 - Display only features available to User based on individual permissions
 - Import and export to/from third-party programs where required
 - Comprehensive help files and/or tutorials
 - Flexibility and ability to adapt for future needs

4. Basic Application Features

The following is a breakdown of the key features required in a successful solution candidate:

- Track billing and payments
 - Direct interface with Quickbooks
 - Reporting
- Create tax receipts
- Enter donations
 - Direct interface with Quickbooks
- Needs to be secure
- Store credit card information
- Manage employees
 - Name, contact information, etc.
 - Hourly wage/salary
 - Previous salary, current salary
 - Qualifications
 - Licensing
 - Multiple (dynamic) qualification types and information
 - Renewal dates
 - Scheduled course registration information and dates
 - Health and Safety
 - Immunization
 - Emergency contact, allergies and medical information
 - Performance Appraisals
 - 3 month, 6 month, annual
- Generates employee reports
 - Salary
 - Show changes in salary
 - Licensing
 - Renewal dates, etc.
 - Medical Qualifications
 - Immunizations
- Manage respite programs
 - Confirm child information is up to date
 - Immunizations
 - Physicals
 - Medication reviews
 - Annual consent forms
 - Release of information
 - Ability to send information update reminders to parents based on expiring dates
 - Automated process by application
 - Set renewal periods (every 3 months, 6 months etc.)
 - Upload forms, etc. to program

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- Log parent follow up calls in system
 - User
 - Name of contact
 - Time/date
 - Notes
- Intake
 - Book date
 - Check calendar for availability
 - Assign to bed
 - Families can request dates
 - Limit number of days / year (or other time frame)
 - View calendar and openings online
 - Do not display names to public
 - Update Care Plan
 - Summary of child
 - Demographic
 - Medical
 - General care needs, restrictions
 - Upload and store any documentation
 - Available for later review
 - Ability to set criteria for staffing and provide staffing suggestions to administrator
 - Number of children
 - Special requirements
 - Time period
 - Etc.
 - During stay
 - Employee check ins
 - Daily notes
 - Recommendations
 - Discharge
 - Summarize visit details
 - Comments, recommendations, forms, etc.
 - Print out for review and sign off
 - Update Care Plan
 - Summary of child
 - Demographic
 - Medical
 - General care needs, restrictions
 - Close file
- Contact Management
 - Share contacts via Outlook
 - Donors
 - Categorized by donation type
 - Ability to enter multiple donation types per donor

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- Per event
 - Per year
 - Receive tax receipt
 - Supporters, potential donors, contacts
 - Generate “acknowledgement of donation” communication
 - Create default message
 - Printable
 - Option to email
 - Log when generated
 - Log events attended
- Manage property location information
 - Address
 - Beds
 - Number in each location
 - Type of bed
- Track appliances
 - Date of purchase
 - Warranties
 - Etc.
- Tracking maintenance issues
- Contractor Management
 - Location
 - Contact Information
 - Start and end dates
 - Dynamic project list
 - Upload and store documents
- Track annual inspections
 - Type
 - Location
 - Date
- Track utilities
 - Received date
 - Paid date
 - Description
 - Location
- Reports
 - Days of Care
 - Number of beds occupied per month
 - Any or all locations option
 - Any or all bed types
 - Mailing List
 - Donation Reports

5. Possible Solution Candidates

The initial list of possible candidates was collected through targeted Internet research with the addition of a custom developed application as an alternative prospect. Due to the fact that a specific Respite solution could not be identified, the candidate net was broadened to include child care, assisted living, and case management software.

Note: Identifying a single off-the-shelf solution for this project may be a challenge due to the solution requirements calling for a broad range of management features that are not commonly available in one integrated package.

1. EZ-CARE2 by SofterWare
<http://www.ezcare2.com/>
2. Residential & Long Term Care by GoldCare
<http://www.mygoldcare.com/goldcare/res/res-index.asp>
3. Microsoft Dynamics CRM - Health and Social Services by Microsoft
<http://crm.dynamics.com/en-ca/health-social-services>
4. Patient Information Management Solutions by PDM Productive Data Management Inc.
<http://www.pdmsoftware.com/>
5. Penelope Case Management Software by Athena Software
http://www.athenasoftware.net/child_youth_services.html
6. childcarepro by Vari Tech Systems Inc.
<http://www.childcarepro.ca>
7. Client Services Manager by AdvanTec Information Systems
<http://www.findsocialservicesoftware.com/CSM-GH.aspx>
8. i-SocialCare By Spis Tech Ltd
<http://www.i-socialcare.com/>
9. Custom Developed Application

6. Eliminate prospects which do not meet minimum criteria

In order to focus only on valid candidates, our initial filtering process relied on identifying clear examples of shortfalls or conflicts within the product which would prove to be insufficient to meet the client’s primary needs (such as “not enough/incompatible features”).

Solution	Status	Reason
EZ-CARE2	Passed	
GoldCare	Failed	Developed for Resident and Long Term Care, GoldCare does not offer enough of the features required from a more short-term rotation perspective such as tracking and scheduling beds. It also does not offer the ability to track donations or property information. Third-party integration capabilities are questionable.
Microsoft Dynamics CRM - Health and Social Services	Passed	
Patient Information Management Solutions	Failed	Developed for Medical Billing, Scheduling and Management, PiMS is very heavily geared towards financial services and lacking the range of scheduling, donation and property features required by the client.
Penelope Case Management Software	Passed	
childcarepro	Failed	Developed for Child Care Services and lacking too many of the necessary features required.
Client Services Manager		Developed for Group Home Services and lacking too many of the necessary features required.
i-SocialCare	Passed	
Custom Developed Application	Passed	

7. Filter candidate list based on additional impacting factors

Having identified the candidates that appeared capable of providing most - if not all - of the requirements, we then reviewed them in greater detail. Our goal in this phase was to remove any candidates which may be unsuitable due to additional impacting factors.

Solution	Status	Reason
EZ-CARE2	Failed	<p>EZ-CARE2 provides a complete software solution for managing any type of childcare or school-age program.</p> <p>Although containing many of the features required, the lack of some key capabilities such as property and donation management as well as the ability to schedule beds, etc. exclude this solution from being a final candidate.</p> <p>This product made it through the first filtering process due to the fact that the database is accessible for custom reports and queries, and modifications could be requested/implemented to introduce the missing features. Unfortunately there is no guarantee that all of the requested features would be added and the estimated effort required for the process would quickly outweigh any benefits that would be gained.</p>
Microsoft Dynamics CRM - Health and Social Services	Passed	
Penelope Case Management Software	Failed	<p>Penelope Case Management Software is a leading mobile client information and practice management CMS/ CIS system designed for a broad range of social service providers - including counselling, mental and behavioral health, disability support, outreach, education, mediation and residential services.</p>

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Solution Discovery Report



Like EZ-CARE2, this candidate offered many of the required features but lacked some of the key capabilities such as property and donation management.

This product also made it through the first filtering process due to the fact that the database is accessible for custom reports and queries. Modifications could be requested without any guarantee they would be included and the estimated effort required for the process would quickly outweigh any benefits that would be gained.

i-SocialCare	Passed
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Custom Developed Application	Passed
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8. Review and identify key pros and cons

Having identified the most suitable candidates, we then reviewed each of them in greater detail.

8.1. Microsoft Dynamics CRM - Health and Social Services

Microsoft Dynamics® CRM can serve as the central database linking multiple systems together to provide a 360-degree view of client information. Microsoft Dynamics CRM works like and with familiar Microsoft productivity tools, such as Microsoft® Outlook®, making it easy for case managers to learn and use. Workflow capabilities can streamline standard processes to help improve client care and treatment outcomes.

Pros

- **Integrate with existing applications**
Integrating front-end client and case coordination applications with back-end legacy systems allows you to create formalized workflows between agencies, which saves time and maximizes the value of your current IT infrastructure.
- **Gain a 360-degree view of the client**
Caseworkers and program managers can achieve meaningful collaboration with a single, unified view of the client. Only with a 360-degree view is client-centered care possible.
- **Report on program success**
Empower management by giving them a view into daily activities and overall progress with dashboards displaying visual reports of customizable key performance indicators. Informed commissioners and department managers can evaluate program success and report on specific activities.
- **Improve case manager effectiveness**
Easy-to-access centralized client data, automated workflows, and reminders help case managers more quickly assess needs, review results of care plans underway, identify additional benefits available, and complete follow-up activities in a timely, efficient manner.

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Solution Discovery Report



- **Support an increasingly mobile workforce**
Give caseworkers the tools they need—offline, online, or in the cloud. Support communications through a choice of devices to enable remote data access, the ability to easily upload case information, and capabilities such as presence and videoconferencing.
- **Extend existing IT investments**
Existing applications can be integrated and extended with Microsoft Dynamics CRM Online, maximizing the value of current IT investments. Automatic updating capabilities in Microsoft Dynamics CRM Online and Microsoft Office 365 free IT staff from routine, time-consuming updating activities and reduce time to benefit
- **Tailor made to suit the need**
Microsoft Dynamics CRM provides a platform that can be molded to fit the needs of the client. Acting as the primary engine, Microsoft Dynamics CRM works in conjunction with front-end applications to provide a wide array of features.

Cons

- **Requires resource specialization**
Customization of the program is possible but integration with a front end solution will still be required and specific knowledge and skill sets will be needed to develop and deploy solutions. This factor will continue to play a part in managing the ongoing maintenance and development of the product.
- **Increased IT requirements**
As this is a Microsoft product there are specific requirements for the hosting and serving of the application including the type of server, server operating system, database and any additional software required to meet the project specifications. These specific requirements offer less flexibility for customizing the solution and taking advantage of other resources which could be beneficial.
- **Licensing and costs**
In addition to the costs incurred by the product specific IT infrastructure, licenses will be required for many of the resources involved including software, databases, etc.

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- **Only part of the solution**

As powerful as Microsoft Dynamics CRM is, it will not provide the whole solution. In order to meet the requirements of the project a front end interface will be required. There are companies which provide already developed applications which integrate with the Dynamics platform but we have not been able to identify any which meet this project's specific needs. As a result, a front end application will need to be developed and interfaced with the Dynamics solution. Any benefits of using an established product over a custom solution will be drastically diminished as IT, licensing and additional development requirements increase time, resources and cost.

- **Impacted flexibility**

Microsoft Dynamics CRM is a full featured and dynamic system which offers a great degree of flexibility and integration but as with any 3rd party solution there are requirements and practices which must be adhered to. This can limit the extent of customization available or at the very least limit the ability to do so cost-effectively. Developing a front end for an existing solution can offer its own set of challenges as the two systems are required to integrate within a set of predetermined parameters.

8.2. i-SocialCare

i-SocialCare is a fully integrated care management software suite designed to make managing a care home, or any other day care, respite or residential care facility, easier for the service provider.

Pros

- **Range of features**

i-SocialCare offers the greatest range of required features found in any of the off-the-shelf solutions. These features include Residential Bed Booking, Respite Booking, Service User Management (CRM), Reporting, and Financials.

- **Accessibility**

A web-based solution, i-SocialCare is available to all users no matter their location. The solution is also browser independent and iPad compatible. Data management is provided in a secure and protected environment.

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- **Integrate with existing applications**
Integration of the i-SocialCare product and other existing applications is possible, extending its use and effectiveness.
- **Client portal**
End users are able to review and interact with data pertaining to their case and submit requests via a web portal.

Cons

- **No provision for donations**
Although designed with a comprehensive bed management module, there is no provision for donations or donation tracking. This also extends to the efficient tracking of donors themselves.
- **No provision for HR**
Similar to donations, the solution currently does not provide the expanded HR capabilities required. There is user support but nothing directly related to the level of HR information such as immunizations, certifications, etc.
- **Minimal direct control**
Due to the nature of the solution there would be minimal direct control available to the client. Although the hosting of the service in a cloud environment is a practical and even prudent approach, the fact that this is a completely off-the-shelf solution purchased from an otherwise unknown vendor raises the risk of unsatisfactory support and limited customization. Once invested in the solution it may be difficult for the client to migrate to an alternative without experiencing some difficulties. The UK location of the provider may also introduce unforeseen complications.
- **Possible absence of Document Management**
Although we were not able to verify the absence of a suitable document management system, the fact that it is not listed anywhere as a key feature leads us to suspect that this may be something that is not an integral part of the solution.

8.3. Custom Developed Application

As an alternative to “off the shelf” solutions, a custom developed application has the potential to better meet the client’s requirements as well as add flexibility when incorporating new features. The client’s needs and behaviours are integrated into the design process reducing the learning curve and making for a more streamlined work experience without the added overhead of unnecessary components.

With a custom solution, only the components required by the client are included but every effort can be made to allow for future advancement and flexibility. Concerns regarding points of access and security would be addressed and integration with the client’s existing software and procedures can be integrated wherever possible in a more direct fashion.

In addition to being able to tailor the solution to fit the requirements the client would gain the added benefit of reducing their relationships with multiple vendors and consultants. Future updates and adjustments would be more readily available in a direct one-on-one relationship with the developer as opposed to one of a large number of customers seeking personal attention within a broad market base.

9. Summary

Based on the research it appears very likely that the client will require the assistance of a third-party to either provide additional development services or manage aspects of either of the two pre-packaged solutions identified. In the case of managing the data and web-based access, there may also be the additional need for hosting, email and/or IT services and support.

It is our opinion that the client would benefit more from a targeted solution which is in tune with their specific needs. Although any one of these solutions can be used, it is almost definite that some adjustments will need to be made and the client will require additional technical consultations throughout the transition process.

10. Recommendations

It is our recommendation that the client further investigate custom development as a viable solution. Although the up-front resources required to develop a custom solution may at times initially outweigh an existing product, the lifetime benefits will exceed pre-packaged solutions and there are avenues which can be explored to help offset the cost.

If the client has an interest in custom developing a solution, a proposal has been provided outlining the costs and timelines as estimated by Atomic North. In the event that the client prefers to engage an alternative vendor, the developer will be available to assist in any way possible if requested by the client.

If the client decides to forego custom development as a viable option it would be our recommendation to solicit a detailed proposal from one or more of the candidates offered in this report.