

# Technology Helping Build Nationwide Franchise

Jeff Salter can do all kinds of things he could not do before, such as expand and nurture a franchise business that is gradually taking his company nationwide. “Before” was when he tried to operate his growing personal assistance services company on Intuit’s *QuickBooks*, on paper time and attendance payroll sheets and a spreadsheet. He was surprised to see how much his business changed after he started using *Visitrax*, a schedule-centric billing application from Stratis, Inc., of Boca Raton, Florida.

Salter’s privately-owned company, Caring Senior Service (CSS), is headquartered in San Antonio, Texas, with a growing list of franchisees concentrated in the South but stretching to 14 states so far. The company provides nurses and other skilled and unskilled caregivers to customer-patients in 8, 12 and 24 hour shifts. Franchise owners are required to use *Visitrax*, a contract provision Salter includes to promote consistency and ease the process of combining cumulative reports.

As a small company planning to grow, the list of cumbersome processes forced upon his staff by the small-business software he had been using led Salter to search for a more sophisticated solution. “Every time we had to make a change,” he relates, “it forced us to redesign our bills. They became so difficult to read, our customers had a hard time understanding them.”

“Scheduling is critical in this type of home care business,” Salter explains. “When we realized *QuickBooks* could not take us into the future, we thought we should be looking at home health care billing software.” What he found there, however, were mostly Medicare-focused vendors who regarded scheduling as a useful add-on when what he needed was a schedule-centric system. “For most of them,” he continues, “the primary selling point was saving money by eliminating staff. Well, I only had a few people on my staff and I couldn’t imagine freeing them up so much that we wouldn’t still need them.”

Eventually, Salter found Stratis, a software vendor that specializes in the non-Medicare side of the home health world. “*Visitrax* starts with scheduling and everything else flows from there,” Salter says. “My staff found it easy to learn and to use because it flows the same way our business flows.” Salter allocated two months to transition from *QuickBooks* and his homemade spreadsheet system to *Visitrax*, planning to run both systems side by side during the transition. He abandoned

*QuickBooks* after only two weeks, however, when he realized right away that *Visitrax* was going to work. “The first bills went out from *Visitrax* and I could see no need to run parallel systems for six more weeks,” he explains.

Not only were bills clean and readable, but Salter and his staff also discovered they now had the ability to track clients, which they could not do previously. “We track them in all sorts of ways,” he proclaims. “We produce individual care plans for each one. We keep the plans updated as necessary. We add information into the database, such as when customers call and tell us which caregiver they liked and which one they didn’t. The change in our office processes is like night and day.”

Producing bills was formerly a one-and-a-half day process for CSS’s staff. Salter estimates it now at about three hours. “In our business, the schedule drives the billing process,” he explains. “Once you establish an accurate schedule, billing is ready at the click of a button.” Salter is as enthusiastic about *Visitrax*’s built-in Accounts Receivable system. “I thought we might have had to transfer back to *QuickBooks* or a spreadsheet to track AR,” he says. “But *Visitrax* seems to do it all, saving us considerable time.”

Recently, Salter provided his nurse supervisors with Palm, Inc. handhelds to carry when they visit patient homes to conduct customer satisfaction surveys or to look in on employees during a shift. Using Stratis’ new Palm-based scheduling application, *Stratis-Link*, these supervisors can check and update schedules from the field and synchronize with the main application. The next update, recently released by Stratis, will give CSS caregivers and their clients Internet access to schedules.

“Stratis is continually upgrading its software,” Salter adds, “and adding interfaces with 3rd-party systems. We have benefited from enhancements as simple as the ability to access mapping software directly from within *Visitrax* with a single button to as complex as interfacing with our choice of telephony systems.”

With franchises in 14 states, from Arizona to South Carolina, Salter is grateful he discovered Stratis before executing his Plan B, which would have been to write his own billing software for his franchisees to use. “With Stratis taking care of new owners getting started with *Visitrax*, software is one less thing I have to worry about with each new franchise.”