



## An Industry Transformation: How technology can lead the improvement in **Aged Care**.

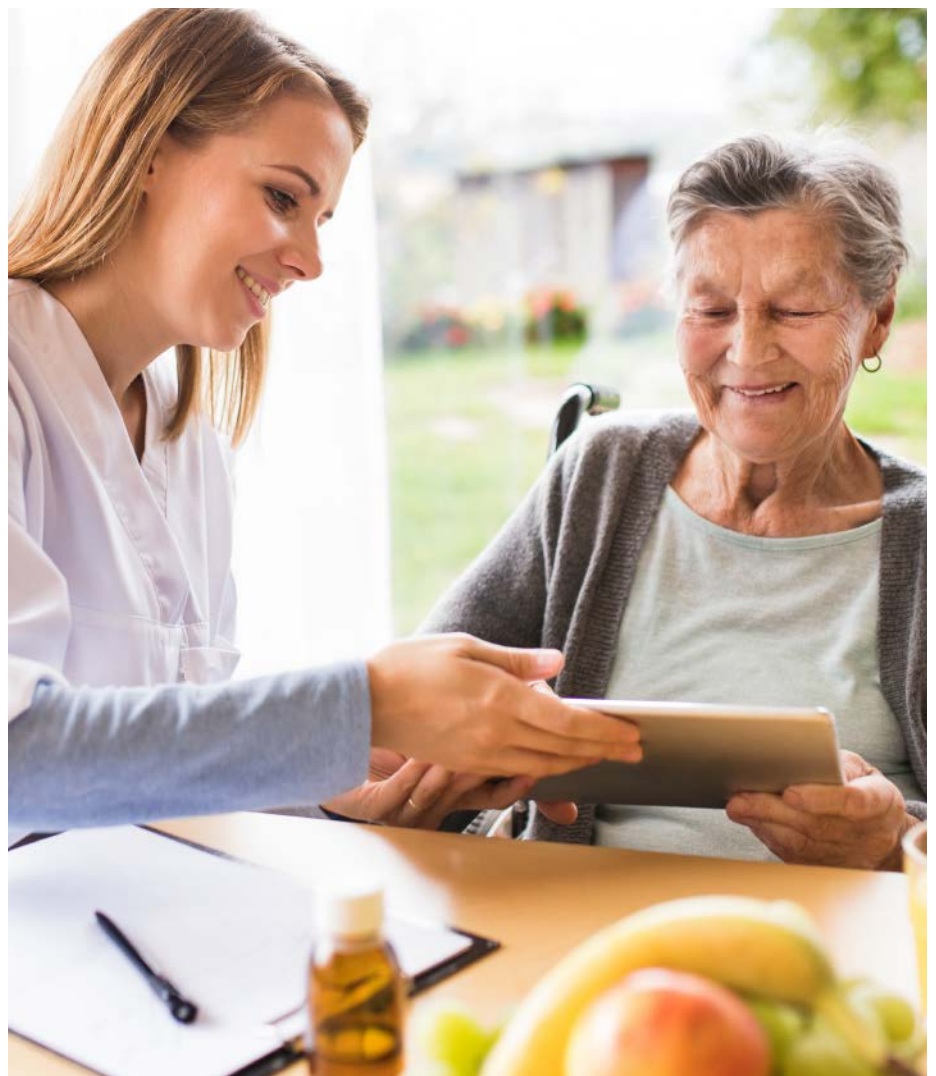
A review of the impact of COVID-19, the Royal Commission into Aged Care Quality and Safety and other forces for change in the sector to enable better, personalised care at scale through the informed use of technology.

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At Allity Aged Care, we understand that your purpose is to make every day the best it can be. You're focused on using innovation to support a high service and performance culture across all your homes. But with the Royal Commission and COVID-19 having a tumultuous impact on the industry, it's understandable if a lot of your efforts have been reactive rather than proactive.

To help you make positive, proactive decisions, we've examined the key issues facing Australian Aged Care providers today. In this report, we explore how technology can help you improve care, efficiency and compliance.

At FUJIFILM Business Innovation Australia, we're focused on supporting you as you make every day the best it can be for residents, families and your own employees, both now and in the future.



Without needing to be an Aged Care professional, for the past couple of years it has been hard to ignore the Aged Care sector when reading or watching news articles dominated by the Royal Commission, or in the past year COVID-19. It is an indicator of just how important the sector is to Australia, with strong ties to local communities making what happens in Aged Care so important to the people relying on it, whether they are patients, families of patients, employees or those working in other related industries.

The sector today is at a critical moment in time. The Royal Commission was the result of many years of headwinds revolving around current financial sustainability, quality of care and the need for immediate improvement to efficiencies that result in long-term digital transformation of the entire sector.

At the heart of it all, the focus always needs to be on patients, and the care they receive. Whatever changes are made to how care is delivered in the coming years, this is not an industry likely to make large profits for the vast majority of those working hard to improve patient care, so sustainability really means just that – being around to deliver that care, however it is needed.

Even before the Royal Commission, the Aged Care industry as a whole was undertaking rapid transformation,

although this change was spread unevenly in places. While some larger groups have had a clear pathway to how they need to adapt, many small and medium providers that lack the resource or experience of significant digital transformation projects; are struggling to either finalise plans or be ready to effectively implement them.

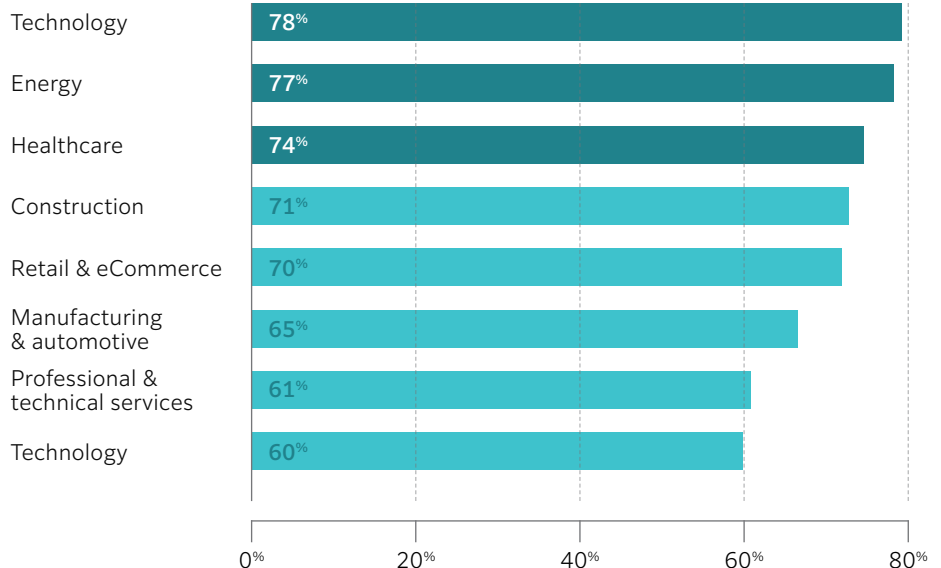
This transformation has had a significant push from an unlikely source: the global pandemic. With COVID-19 making transformation projects have-to-have rather than long-term plans, Australian businesses of all shapes and kinds have been made to turn those plans into actions. As an indicator of this, in Twilio's recent Digital Engagement Report, Healthcare was the third highest ranking sector globally for the speeding up of digital transformation projects in 2020.<sup>1</sup>



### Technology, energy & healthcare companies were most likely to speed up digital transformation in response to COVID-19

78% of tech companies, 77% of energy companies and 74% of healthcare organisations say the pandemic sped up their digital transformation a great deal.<sup>1</sup>

Has the COVID-19 pandemic sped up digital transformation in your organisation?



1. Twilio Global Digital Engagement Report, August 2020



**Increased productivity and improved care experiences are a vital pathway to the future for Aged Care providers like Allity Aged Care.**

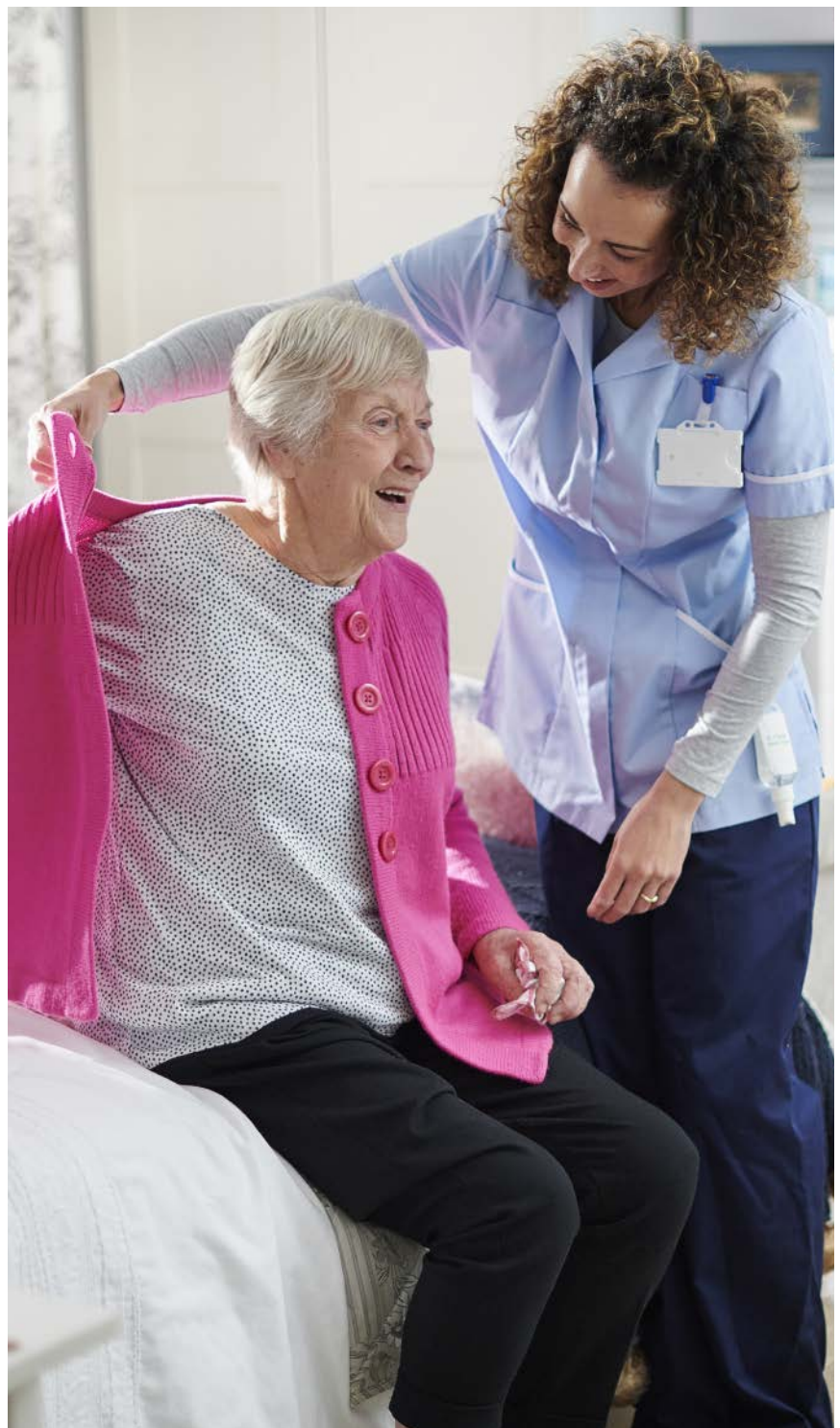
This has meant many providers who had not previously looked at digitising significant parts of their care operations, started to address these problems with an urgency previously lacking in their operations.

But beyond the pandemic, there are clearly other drivers at work. Keeping up with the changing landscape brought about unsettled market conditions, a shift in consumer sentiment, and regulatory changes implemented as a result of the Royal Commission.

Technology usage was a key element of how the Royal Commission saw the future of the sector. There is often a focus on compliance and regulation in this context, however increased productivity and improved care experiences are a vital pathway to the future. With increased demand (and the increased complexity of how to deliver against those demands), plus the growing cost of running Aged Care facilities combined with issues around a lack of available, well-qualified staff, are all likely to be challenges for the long-term. That is, unless dramatic structural changes in the way Aged Care works are implemented.

This unprecedented amount of stress being placed on providers, and the downward pressures these issues cause on processes and systems to support their endeavours, means delivering optimal levels of care could suffer dramatically without the intervention of digital solutions.

Based on our experiences with healthcare clients, we have looked to examine the key issues facing Aged Care providers in this report so we can help to work together as an industry to identify where and how technology and innovation can play a key role in improving business operations, reducing costs, and creating more efficient systems that support providers fulfill their mission to deliver the best quality of care and improve health outcomes for patients now and in the future.



# The many issues currently being experienced.

There are a number of recurring areas of stress for Aged Care providers in Australia at this point in time. So much of the focus has been on the Royal Commission report into the future of Aged Care, its sustainability and its readiness for change in the way Aged Care is accessed by patients in the coming years. But it is important to go back a step and look at some of the challenges facing these organisations as a result:

## Tighter regulatory controls

Meeting compliance measures as a result of the new Aged Care Quality Standards implementation, will be difficult for providers hosting critical data residing in disparate locations and across a range of systems. This will impede their ability to access relevant information and inhibit their ability to deliver personalised care.

## Increased operating costs

With 64% of all care homes and 58% of all home care providers reporting annual losses in 2019, it has become apparent that aged care providers are losing money, putting pressure on their ability to deliver care for both residential and home care patients.<sup>2</sup>

## Patient centred care

Only 1 in 3 Aged Care providers have holistic consumer records, which means that there is little likelihood of consumer records being able to integrate with external datasets.<sup>2</sup>

## Telehealth / Telecare

45.4% have not adopted either Telehealth or Telecare into their existing tech stack, meaning many tasks that could be either automated or simplified still rely too heavily on manual input.<sup>2</sup>

## Business and Administrative Systems

Only two technology enabled systems are used widely in Aged Care — Payroll and Accounting, leading to a focus on technology as a back-office process solution rather than a wider business change strategy.

## Digital Data Collection and analysis

Only 19% are using Data Analysis to improve how they go about optimising care at the point of delivery. This is down to a number of factors – internal skills being one – but most importantly, a high degree of difficulty in linking various data sources together.<sup>2</sup>

## Clinical Decision Support

Clinical Decision Support is a relatively new concept to Aged Care and currently is applied mainly to high-risk clients. There is low usage as well as very few tools available and those that do exist are quite expensive for everyday operation.

## Smart Homes and safe Homes

There is a need for attention to be paid to the interface between care in the home and Smart Home technologies, incorporating both clinical and consumer tools, and finding ways for both to complement, even enhance, each other. It is noted that most Smart Home devices are not designed to be integrated outside their own ecosystem.

## Data integration with federal systems

In the recent ACIITC report, one key area of focus was around improving Business to Government (B2G) reporting processes, incorporating codesign with the Aged Care industry. Reducing cumbersome processes are critical to saving time on repetitive, manual tasks that have the potential for human error.

*“COVID-19 has demonstrated that when there is a critical mass of will and clear priorities, innovation can quickly reach the front line.”<sup>2</sup>*



In the future, it will be imperative that Aged Care providers continue to evolve to meet the new standards in healthcare and ensure they continue to deliver an optimal level of care.

FUJIFILM Business Innovation Australia works with care providers of all types, delivering technology solutions that enable better control of data, improved task management across all functions and enabling better care experiences through improved processes.

This experience gives us a deeper insight into the current challenges, and when we talk to care providers one key issue is regularly raised that transcends what technology solution they look to implement. Very simply, there are not enough staff, and not enough of them have the right level of experience in order to deliver truly exceptional care.

This was highlighted in the Royal Commission report:

*'About half of people (of more than 10,000 submissions from around Australia) were concerned about staffing, including understaffing, unanswered call bells, high rates of staff turnover, and agency staff not knowing the residents and their needs.'*

*'As a result, the inquiry recommended minimum quality and safety standards, including for staffing. This includes 40 minutes of care by a registered nurse each day and 200 minutes of care by 2022, and 215 minutes of care per day by 2024, of which 44 minutes are provided by registered nurses.'*<sup>3</sup>

Linked directly to a provider's ability to deliver this level of care with the right people, higher pay was also recommended, as the commission noted

that *"wage increases should be an explicit policy objective of Aged Care funding"*.

This means that providers need to be looking at making immediate steps to reduce waste, cost and inefficiency throughout the service delivery process. Into the future, staffing will continue to be a challenge but there will be wholesale differences in the way care is typically delivered.

Investment is being made in training, wages and overall, more attractive packages for more senior, trained and accredited staff. However, the largest number of 'new' employees in the coming years comes in the 'unlicensed' portion of the workforce.

With this in mind, to implement the changes required and achieve their objectives, providers need technology that will enable simple, direct and clear recording of data, as well as deriving the true value from this data for all and any circumstance where care is being provided.

So what is driving this increase? The same personalisation trends impacting businesses of every kind, mean that what care means now compared to what it

may mean in twenty years time, could have changed fundamentally. As the healthcare system becomes more flexible and responsive to changing circumstances in the future, home care, hybrid home and residential care and other options will become more important to offer.

Clearly, demand has been and will continue to grow as the aging population not only increases but also expects more personalisation to the way they are looked after by carers.

This distributed network of patients will need the right kind of care administered specifically to their needs, with a heavy focus on data and insights to ensure this is what they get. Better quality data, easier access to insights and recommended steps are imperative to ensure patients get exactly what they want — this will also make it easier for unlicensed care practitioners to deliver quality care, at scale, without having to do all the work themselves.

This future state is the true opportunity to move Aged Care from a reactive industry towards a proactive, personalised example of what can happen when great carers and great tech solutions combine for better human experiences.

#### Deloitte Access Economics Modelling<sup>4</sup>

FTE	2018	2020	2030	2040	2050
Care Management	15,479	16,729	26,051	29,407	35,384
Nurse Practitioner and Registered Nurses	22,342	22,896	49,911	56,071	70,840
Enrolled/licenced nurses	11,565	11,116	15,208	17,959	23,176
Unlicensed personal care staff	116,879	127,189	169,739	205,084	245,589
Allied health	8,065	8,200	12,365	14,300	17,751
<b>Total aged care</b>	<b>174,329</b>	<b>186,130</b>	<b>273,274</b>	<b>322,820</b>	<b>392,739</b>

3. Royal Commission report on Aged Care Sector, March 2021

4. Deloitte Access Economics Modelling

# The Opportunity for Providers

How can we start making changes today that will support better Aged Care? We believe a range of areas can be looked at immediately to improve quality of care:

- The reduction of time spent on tasks that could be automated, such as patient record management, or where workflows can be automated to speed up decisions and reduce errors.
- Personalised care driven by these automations, with data constantly updated and actionable.
- The digitisation of paper-based tasks, again feeding into automated processes that will improve care decisions at the same time as improving data management issues.

Very simply, there is an opportunity to let technology take the pain of repetitive tasks away from humans, and as a result enabling the delivery of much better, personalised and easily tracked care for the patient.

The areas highlighted in the previous page outline the key challenges common to providers. Ideally, the technology roadmap each provider has will incorporate elements of all, but in a coordinated fashion that delivers integrated data and insight platforms. They link together three vital components: faster, more automated processes; enabled by better data management; and simplified by reducing the time staff have to spend on collecting and enriching information.

In the Royal Commission report, many recommendations focus on the ability of government and providers to work seamlessly across the rating, monitoring and administration of care by common data policies that enable effective reporting and better point of access care to patients, whether they are at home or in residential homes. Whilst much of this will involve improvement to the My Aged Care platform, providers will need to be able to effectively manage this data and report it to specific standards.

One way to reduce the current pressure on the Aged Care system is to release more funding for Home Care, which is also more cost effective for the government. But this

comes with a significant challenge: moving further towards this model will create more pressure for care providers, who will now have greater case load responsibilities and reporting requirements. Without automated workflow solutions or case management software to assist in these processes, providers will fail to collect, manage and act upon the data they will have to collect to provide this increased demand for Home Care.

As an example of this plan in action, the following section looks at how providers can get the right support from technology vendors like FUJIFILM Business Innovation Australia to deliver better care to patients across the country.

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## Automate to simplify

Process Automation has the ability to take a wide array of existing high-volume, simple and complex processes and dramatically improve them by reducing time demands of staff and making errors less likely to occur. Providers can start by moving data away from paper to enable digital solutions for data management.

These benefits touch large areas of business, such as improving digital communications to ensure patients and their families are getting the right information when they need it.

And where this change is implemented, data can then be more effectively

managed and the value from it extracted to enable better care and enhanced experiences.

Typical examples of how to deliver these benefits lie in a few common areas of support:

- Residents or staff onboarding
- Digitised documents reducing storage issues across all areas of a provider's business
- Claims, orders and accounts payable / receivable processing
- Visitor screening and management



# Improved Data Management

Content Management is not a new term, however the way we can tag data today means there has never been more value in enabling faster archive retrieval and clear processes designed around heightened levels of compliance regulation.

With a view to recommendation 27 from the Royal Commission report (focused on being able to provide records in a standardised manner to ensure faster decisions), this type of solution is tailor-made for Aged Care providers to help improve the quality-of-care experiences for patients and their families through more efficient data management, and extended capabilities for care personalisation through integrated data management.

Better content management has any number of use cases, but the most prevalent examples come in the following areas:

- Resident or patient records management
- Integrated care plans and service delivery management
- Complaint and case management
- Quality assurance and compliance management
- Resident or patient records scanning services



## Outsource what you can

Look for where work doesn't need to be done in-house, reducing the time and resource burden for services that could also be completed faster by specialists.

From our perspective, we have a long history in managed services that are either delivered on our customers' premises or from our own offices — meaning providers get what they need and how they need it. This may be in support of improved communications with residents or optimised hardware usage within a

provider's infrastructure. You can reduce the IT burden by removing administrative tasks and a redundant IT Infrastructure.

Typical examples include:

- Managed IT & Print Services (MPS)
- Marketing and communications services

**Technology and innovation will play a key role in streamlining Allity Aged Care's business operations, reducing costs, and creating more efficient systems that support your mission to make every day the best it can be.**



# Conclusions, and where we go from here

The Royal Commission is the headline we are most familiar with, however the complicated and difficult questions it attempts to find answers for, have been part of the discourse in Australian Aged Care for many years. As with the reaction to COVID-19, big change can come when a common purpose is clear — we are now in a period of time where that change looks likely to have truly significant impacts in the short to medium term.

Although more than 3 out of 5 Aged Care providers are already implementing their own technology roadmaps, the adoption by aged care providers of technologies that support aged care and enhanced quality of life has been dependent on the willingness of individual providers to engage with technology.<sup>2</sup>

FUJIFILM Business Innovation Australia understands the healthcare industry, and specifically the circumstances aged care providers have to work in, meaning we co-create solutions with our clients, enabling them to deliver the best care in the most sustainable way, personalised to patient requirements.

It is important that the aged care sector take a proactive approach to the way in which technology plays a role in its services, providing leadership on a range

of issues associated with delivering care in an increasingly technology-driven world.

- Aged Care reform is founded on the twin principles of choice and control and this applies equally to the use of technology designed to enhance older people's quality of life.
- Technology must be applied with sufficient flexibility to support varying consumer needs and preferences, in line with reform directions of choice and control.
- Technology for use in private homes must integrate seamlessly with patients' lives — meaning personalisation of care is critical to achieve this.
- The development of technologies specifically for application in providing care and support must be based on co-design, that is, involving end-users.

- The effectiveness of technologies developed to support quality care and individual wellbeing must be evaluated over time, preferably through co-evaluation with end users.
- Technology must be integrated into aged care policy and processes (rather than added separately to daily care and support).

The Royal Commission's Quality and Safety recommendations are a positive opportunity to re-imagine how and where care is delivered; how technology can be unobtrusive; and support a brighter future for all. With actions that align to common systemic issues, we can create a truly transformational story that means Australia can be a leader when it comes to modern Aged Care.

FUJIFILM Business Innovation Australia are the technology behind better Aged Care. Our ethos is to provide our expertise in a collaborative way to ensure our customers deliver better care for patients or residents with the right solutions for their needs. We have helped a wide array of Australia's Aged Care providers to improve their patient care by more efficient solutions — talk to us about a consultation on supporting your technology roadmap.

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