Digital Care Services

Harnessing ICT to create sustainable aged care services

Contents

Summary

As more Australians live longer, the challenges of providing quality aged care services to all older Australians grows. Australia's aged care system is wrestling with enormous challenges in terms of demographics, workforce development and care arrangements. Given the tight budgetary constraints faced by providers and governments, the sector needs to drive a step change in costs to deliver higher-quality care more affordably.

Aged care consumer expectations are also rising: they require greater control over their care budgets, options for how care is delivered, insights into providers' services and quality ratings, and access to their own clinical information.

To better manage the complex care needs of greater numbers of older Australians, including the growing demand for Dementia Care, providers will need to harness the power of information and communications technology (ICT) systems. In the aged care sector, enhancing ICT includes using mobile devices to boost workforce productivity, implementing managed services to cut capital investment, and establishing common data standards to make it easy to share electronic aged care health records.

ICT is part of the business process that delivers quality care and will help aged care organisations achieve a step change in costs. Providers who deploy technology solutions will create an environment where there is more effective clinical information sharing, workflow management and resource utilisation. A transformational approach will be required to meet the demand growth as both workforce and financial resources are limited.

To help the sector adjust to this new environment, the Aged Care Industry Information Technology Council (ACIITC) with the assistance of Accenture has identified 5 ICT pillars for providers to prioritise:

1. **eHealth systems** to ensure health records can be accessed and seamlessly shared across the sector

2. **Telehealth and mobility services** to allow workers to be more efficient and better assist older Australians who are still at home

3. **Care management systems** to help clinicians and carers better integrate care planning and medication, and track the needs of individual aged care consumers

4. **Management information and reporting** to implement cutting-edge platforms to improve care and reduce costs by analysing care and administrative costs and outcomes

5. **Core technology and support** to implement cutting-edge platforms and support services to improve IT capability, flexibility and cost efficiency

To start building this capacity now, governments and providers need to develop a roadmap for the sector, including seed funding for innovative programs, a 5-year plan to address ICT capability gaps, and ongoing proof-of-concept projects to trial new approaches to care.

By undertaking this process, the nation's providers can build the high-performance ICT needed to deliver high-quality care now and in the future.

Aged Care: The Challenge Ahead

Rapid Demand Growth and Workforce Pressures

Australia is at a critical point in the provision of services to older Australians. Demand is set to soar in coming years with an estimated 1.6 million older Australians accessing age services each year by 2023, up from around 880,000 in 2009.[1]

Aged care providers do not have the workforces they need to deal with growing service demand. Based on current projections the industry will need to grow from approximately 210,000 workers in 2010 to almost 400,000 workers by 2025.[2]

Providers face increasing challenges attracting and retaining aged care workers while simultaneously the industry is expected to experience consolidation of providers over the next decade. Leading providers are looking to improve the productivity of their workforce by reducing the time spent on administration and travel, maximising face-to-face care time, and providing unobtrusive monitoring or assistance when carers cannot be there.

Many providers have minimal capacity to equip and train staff with new technologies and experience difficulty attracting and retaining skilled IT workers. There have been challenges with limited change support to help the workforce adopt new technologies and service models (e.g. Telehealth)

The Shift to Consumer-Directed Care

Older Australians expect more from their care providers and government to help them maintain independence and age with dignity. These growing expectations place increased pressures on the aged care industry to provide a universal standard of high-quality services with fast access to a variety of primary, community, residential, hospital and/or home care based services.

The industry is rapidly moving into an era of consumer-directed care (CDC), where older Australians will have a greater say in what services they receive and how they are delivered. This will require providers to offer more integrated services and to collaborate with other providers on care, budgets, pricing and contracts.

CDC solutions will need to effectively support access to services that have traditionally been siloed between health and human service departments and service providers. There is increasing pressure for personalisation and convergence of these programs and services.

ICT is a key enabler in helping providers meet the demands of an era of CDC, where older Australians choose the type of care they access, how it is delivered and which providers deliver the services. By harnessing technology, providers can develop CDC packages that offer older Australians – whether still at home or in aged care facilities – a range of tailored, high-quality services.

ICT Capability Challenges

There is a large degree of variation in technical competency and capability across service providers. This impedes sharing and the difusion of technological innovation across the sector. This has been compounded by the historical lack of sector-wide IT planning and guidance to help support aged care providers.

The majority of aged care providers do not have the right technology to drive more flexible service delivery. Across the sector, there is huge variability between the budgets of larger and smaller providers, and in internal perceptions of the importance of ICT investments.

In our experience, many organisations are still using paper-based records and struggle to keep pace with new ICT capabilities, a situation that can have a significant impact on the cost of care. The aged care sector has fallen behind other areas of healthcare in terms of its level of new investments, and previous investment capability.

The limited investment in IT by provider organisations and government affects software vendors and constrains progress. Along with more investment, there is a need to further develop eHealth infrastructure and security frameworks to enable interoperability across aged care.

For example, State Health Departments and Community Pharmacies have had national investments that have resulted in upgrading their capabilities and developing standards to help transform their services. Aged care is an important next step as Australia continues to take action towards improving the overall quality, access and affordability of health and human services nationwide.

Charting a Course for the Future

Now is the time to plan and implement new thinking and processes to ensure ongoing quality service provision is available for an ageing Australia.

The answer is not simply more resources, since resources are both scarce and finite. Instead, it is about making greater use of ICT to help the entire system deliver high quality and accessible care. To meet future needs ICT investments need to be closely integrated to encompass the needs of providers, older Australians, carers and government.

ICT can help providers address these challenges in a cost-effective manner. For instance, technology can help providers enhance the productivity of clinicians, reduce administrative and travel burdens, maximise face-to-face care and establish unobtrusive monitoring when carers cannot be there in person.

We have identified 5 key areas that should be prioritised.

eHealth

eHealth is the means of ensuring that the right health information is provided to the right person at the right place and time in a secure electronic format. eHealth solutions support greater quality, efficiency and continuity of care when aged care consumers are transferred between services, such as from home care, to hospital, to residential care and specialists.

Overview and Target Benefits

At present, aged care consumers may have health records at aged care facilities, public or private hospitals, and at GPs and specialists. This means aged care staff may need to spend time tracking down clinical information and may duplicate existing data when consumers are transferred between care providers. In some cases, this can lead to increased clinical risk when up to date medications information is not effectively communicated between hospitals, GPs and aged care facilities.

In recent years, the Federal Government has introduced the Personally Controlled Electronic Health Records (PCEHR) system to apply a national framework to consumer health information, including establishing a common set of data standards across all care providers. The PCEHR system allows providers to access information, such as hospital discharge summaries and medications information, from others.

The benefits can be significant for individual providers and the sector as a whole. For instance, eHealth can help to:

- Improve the continuum of care, and assist consumers transition from hospital to residential aged care, by making information sharing cheaper, faster and more efficient

- Reduce time delays and communication breakdowns between providers

- Eliminate duplicated activities by maintaining more accurate and accessible records of consumer care and treatment

- Effectively link all arms of healthcare, such as physiotherapists, radiologists, hospitals and GPs, to improve aged care outcomes.

Priority Areas for Ongoing Development

Aged Care industry leadership groups need to drive the adoption of eHealth, including through allocating funding, building the case for change and selecting proven vendors that can successfully deliver ICT solutions.

To take advantage of the PCEHR, providers need to update how they collect and share data. Providers should seek to customise their eHealth systems to cater to the needs of different residents/consumers, and to provide a useful timeline of consumer health and treatment histories, care plans, advanced care directives and secure messaging.

Government has a role in establishing eHealth infrastructure – such as the PCEHR system – and driving take-up among consumers. It would be valuable for government to support the industry development of aged care specific eHealth data and document standards as enhancements to the existing PCEHR solution. The government also has a pivotal role in enabling new solutions and uptake through pilot programs, communication and education regarding the benefits of eHealth and change management support programs.

To kick-start this process, we recommend government works with representative providers and vendors to undertake proof-of-concept projects to drive information flows between primary, community and acute care facilities. To gain the maximum benefits possible from eHealth, we recommend providers work to put the following capabilities in place:

- **Health identifiers** to enable linking of consumer records and provider information with the PCEHR system and other providers

- **PCEHR compliant systems and aged care document standards** to ensure providers' health records can be shared and accessed via the national system, and to enable the use of enhanced PCEHR functions to support aged care priority needs for information such as transfer documents, discharge summaries and medications information

- **Secure messaging standards** to enable secure messaging with the PCEHR system and point to point between care providers

- **Aged care assisted registration** to enable aged care providers to register consenting consumers for use of the PCEHR system

- **Remote Workforce Solutions** to enable workers to access health records via mobile devices.

Telehealth and Mobility

Telehealth uses ICT to address distance challenges. Providers can use home monitoring, call centres and video consultations to manage certain medical conditions and potentially allow more people to remain in their homes for longer.

Overview and Target Benefits

Telehealth provides consumers with increased support and confidence to play a more active role in their own care while living in their own home longer. Providers can encourage older Australians living at home to make greater use of nurses through Telehealth channels (a currently underused service) to substitute for face-to-face GP visits. This would enable providers to potentially deliver more care at lower cost, and refer more serious ailments to GPs or specialists.

Mobility solutions allow aged care staff to work remotely, collaborate with colleagues and monitor consumers who remain in their homes. Workers are equipped with mobile devices and applications that can access clinical information from organisation specific systems and/or the PCEHR. These solutions are increasingly equipped with video and text based collaboration tools and decision support 'alerts'.

Telehealth and mobility solutions are not a development of the future: they are here now for providers to take advantage of. The current Telehealth trials for aged care video consults and consumer biometric monitoring being delivered via the National Broadband Network infrastructure is a key example of current activity in this area. These pilot programs are proving that Telehealth is an effective way to deliver care for targeted consumers, improve the timeliness in delivering quality services, reducing access delays across other services and providing a more positive consumer experience.

For instance, Telehealth and Mobility solutions can help:

- Integrate clinical and care management information and alerts into mobile workforce solutions to provide information to care providers when and where they need it

- Reduce staff travel time, enabling them to focus more on delivering care and less on administration

- Improve staff connectivity to key information systems wherever they are

- Enable CDC approaches through remote monitoring and health coaching, virtual meetings, collaboration tools, and peer-supported networks that help reduce isolation

- Address equity of care across metropolitan and rural locations by offering improved access to medical practitioners via videoconferencing, health coaching or biometric monitoring

- Improve workforce response times in community and residential care due to biometric monitoring 'alerts' delivered to mobile devices.

Example Home Care Telehealth Pilot

Jane is an 82 year old widow living alone in her own home. She had a heart attack 3 years ago and has ongoing problems with high blood pressure. She also has Type 1 Diabetes.

Jane has been participating in a home monitoring Telehealth trial and has found the whole experience very positive and enabling.

Each day she uses diagnostic devices to measure her blood pressure, oxygen and insulin levels.

She puts each reading into her hand held tablet which automatically uploads the reading to a server that retains and tracks the trend data Jane is collecting.

The Telehealth Nurse who assisted Jane to get set up carried out a detailed assessment of Jane's health status. This assessment helped the nurse set a range of health indicator parameters which are included in the system.

If Jane's diagnostic results are outside these parameters the system will alert both Jane and the Telehealth Nurse. Depending upon the nature of the alert it may trigger a home visit, a video conference or a GP visit.

Importantly, it allows Jane to closely monitor and manage her own health status. If she has a sudden change in blood pressure or insulin level she can backtrack immediately to try and identify the cause.

Jane says the system has put her firmly in control of her own health and that she feels much more confident about her health and that she now knows very quickly whether she needs to change lifestyle or seek assistance.

This Telehealth enabled long term care service has helped improve Jane's self-management of her condition and reduce her reliance on the local hospital by 30-60%. This is a reduction of 2 to 3 preventable hospital admissions per year for Jane.

Priority Areas for Ongoing Development

While leading organisations are rapidly deploying Telehealth initiatives, many providers do not currently have the ICT capabilities to develop new service models that draw on Telehealth and mobility solutions. This could create a highly unequal playing field and significantly different care service capabilities across the sector.

To begin or further develop this process, we suggest providers undertake proof-of-concept projects to uncover how Telehealth and mobility can drive better consumer outcomes in organisations. For example, this could include developing home monitoring solutions for consumers, or remote support initiatives that link multidisciplinary clinical teams with chronically ill consumers who are still in their homes.

To achieve scalable adoption of Telehealth the government will need to enable large scale deployment and policy setting for Telehealth Medicare Benefits Schedule items to be available to fund GPs, nurses and aged care providers. A scalable policy and financial mechanism will need to optimise all existing resource options while creating new capacity for Telehealth services. Additionally, the rollout of high speed internet connectivity, such as the National Broadband Network, is a key enabler for conducting video consultations for aged care consumers living in regional and rural communities.

To achieve greater business benefits in this area, we recommend focussing on:

- Remote and home monitoring, to closely observe and deliver high-quality care to consumers who are still in their homes

- Clinical collaboration and video consultations between residential and mobile nursing staff, between providers and GPs, and direct consultations with consumers from their usual place of residence (or mobile device)

- Mobile workforce solutions, to enable staff to become more efficient in recording and accessing consumer data

- Workforce training and support, to ensure existing and future aged care staff are comfortable with the technology and can use the complete suite of functionality.

Care Management

Solutions that help enhance the quality of care for aged care consumers by improving integration of care planning, personal health support, medications management and holistic services to help manage chronic conditions.

Overview and Target Benefits

In an era of CDC, consumers will demand more integrated and tailored care. Providers can use ICT Solutions that help enhance the quality of care by improving integration of care planning, personal health support, medication management and holistic services to help manage chronic conditions.

At present, the aged care sector is witnessing a historic shift to CDC, which is fundamentally changing the nature of care management. Consumers have an increasing amount of control over the types of services they receive and are demanding care that extends across providers and delivery methods (such as personalised treatment and remote consultations).

For instance, Care Management solutions can help:

- Improve access to timely and relevant information through shared care plans and medications management records

- Improve clinical insights and decision making via clinical decision support tools

- Improve tracking of individual consumer needs to provide more personalised care

- Foster sharing of care plans and updates between multiple care providers via eHealth data exchanges and clinical workflows

- Providing increased information to consumers to promote self-management via the shared 'care plan'.

Priority Areas for Ongoing Development

In delivering next-generation care management, providers have to overcome substantial challenges. The quality of current care management systems varies widely, and reflects the range of offerings supplied by vendors. There is also a diverse range of care expertise spread across the sector, but too few links between providers to foster information sharing.

Overall, we believe providers need access to more flexible and affordable systems that can offer increased functionality, such as through cloud based services and flexible module based systems. There may be a need to drive a greater sector-wide approach to developing common IT platforms and shared services targeting care management.

To achieve greater business benefits in this area, we recommend focussing on:

- **Shared care plans** to promote sharing of care plan information between care providers, GPs and consumers

- **Integrating enhanced medication management tools with national health records** for a holistic view of which medications aged care consumers currently take

- **Electronic transfer of prescriptions** to improve the prescription workflow between nursing home, GP and pharmacists

- **Biometric monitoring information** to be integrated into care plans to provide more consumer history and automated alerts to nursing staff if a consumer's condition is deteriorating

- **Self-management tools and portals** that can be used by consumers and their carers to remain at home longer, maintain independence and empower them to manage their care and health needs.

Management Information and Reporting

Sophisticated information management, data exchange, analytics and reporting functions are critical to improving care delivery, and support a culture of continuous improvement.

Overview and Target Benefits

Providers have the opportunity to reap substantial business benefits by implementing more modern information and reporting platforms that generate aged care specific insights to help support improved service delivery performance and cost management. By using ICT in this way, providers can lift care levels now and support a culture of continuous improvement by enhancing their ability to collect and analyse data, and increasing their analytics and reporting capabilities.

To help reduce the administration burden on aged care providers the government should streamline regulatory reporting requirements and look for synergies between data collections. At a minimum, this will require the industry to establish data standards and a core data set for aged care providers.

There is a further opportunity for the industry to establish a national data exchange and reporting hub as a service for providers to access and utilise advanced business intelligence, analytics and reporting capabilities. This service would provide a standard capability for managing information and generating insights across the aged care industry and could be used to generate benchmarking across providers.

The major benefits of this approach include:

- Greater timeliness and value of information

- More consistent data and reporting standards to drive streamlined reporting across the sector

- Improved quality monitoring and benchmarking capabilities

- Increased data available to management to build knowledge pathways, increase productivity and make organisations more efficient

- The ability to provide higher-quality information to older Australians, enabling them to make more informed choices about aged care services.

Priority Areas for Ongoing Development

In aged care, the IT ecosystem is relatively undeveloped and lacks a data dictionary, common standards and comprehensive policies. This can make it difficult for providers to collect meaningful data to benchmark provider performance and uncover strategies for improvement. It would be valuable for governments to review their data collection and reporting requirements, and determine whether these could be simplified and streamlined to help providers become more efficient.

There are also unresolved questions in developing more effective reporting capabilities, such as who owns the data, what privacy and security arrangements need to be in place, where data is stored and how users can access this information, legal issues around how data can be transferred between providers, and who funds additional governance frameworks to regulate data collection and use.

Governments and the industry need to address the barriers listed above in a clear and consistent way – such as through longer-term strategic responses enacted in a bipartisan manner. Vendors have a key role in helping providers adopt and implement new technology platforms and cloud service options.

To accelerate the adoption of common reporting standards, governments could offer financial assistance to establish an industry wide data and reporting hub. This could include aged care specific tools and reporting based on a core reporting data set, shared data management infrastructure services and tools for performance and cost analytics, benchmarking and regulatory reporting.

To achieve greater business benefits in this area, we recommend focussing on:

- **Data standards and a core aged care data set** to streamline and reduce the burden on multiple data and reporting

- **Efficient sector-wide data-collection arrangements,** to drive common process improvements and lift the quality of care across the sector

- **Enhanced analytics tools (including monitoring analytics),** to better understand how care needs are changing and how organisations are performing

- **Establishing an industry data hub and reporting service that can be used by providers** to help lift data management and reporting capabilities and be consumed on a monthly 'pay as you go' subscription model.

Core Technology and Support

To better manage the complicated care needs of more people, providers need robust ICT systems to underpin their operations. This includes the use of managed services to reduce capital investment, while delivering the latest technology in functions such as data storage, payroll and transaction management.

Overview and Target Benefits

Federal, state and local governments in Australia aspire to deliver highly available, responsive and accurate corporate services. In light of whole-of-government strategic reviews into service delivery and the enabling technology, Australian government departments and service organisations are looking for ways to advance service delivery, improve productivity, and reduce the cost to service, all in the context of constrained lending and capital spend.

Shifts in technology now provide an opportunity. With the ability to consume infrastructure and "line of business applications" on an as-needed basis, such as Infrastructure-as-a-Service and Software-as-a-Service, a new concept has emerged. Horizontally integrated corporate services applications (the ERP solutions of yesterday) can now be consumed as-a-Service with applications that are scalable, secure, robust and flexible.

This approach to enabling a sector wide uplift in technology capabilities is relevant to the Australian Aged Care industry. We call this Solution-as-a-Service. For many aged care providers and health departments, this is a shift in mindset to 'renting' rather than owning applications and infrastructure. A sector wide solution should be built, with selected solution options to allow for provider or geographic variations, and further developed based on a defined roadmap to address evolving business needs and enabling software platforms.

The major benefits of this approach include:

- Focusing management attention and investment on core service delivery rather than ICT systems and improvements

- Transitioning quickly, and therefore realising benefits quickly

- Benefiting from the most up to date leading process standards and technology solutions

- Boosting confidence in outcomes by adopting standard security risk mitigations, service levels and standards based processes

- Transitioning and operating corporate services on existing operational budgets

- Focussing capital investments on enhancing core service delivery rather than ICT investments.

Priority Areas for Ongoing Development

To achieve greater business benefits in this area, we recommend focussing on:

- Cloud Solutions and Services – focus on improving the cost effectiveness of ICT investments and leveraging as-a-Service ICT solutions. This includes defining a core sector wide IT strategy and establishing a sector wide solution that establishes an option for providers to procure IT systems as-a-Service

- Pooled Investment and Support Services – focus on contestability, flexibility and scalability of core ICT investments and support services industry wide. This pool should be used to support sector wide solution development, implementation and ongoing support services

- Public Private Partnerships (PPPs) – focus on establishing PPPs to drive proof-of-concept projects and further roll out of industry wide capabilities.

Singapore Ministry of Finance: Back-office Managed Service Platform Improves Government Productivity

To help the Singapore Ministry of Finance deliver public service for the future and improve government productivity, Accenture developed a single shared services platform, the Alliance for Corporate Excellence (ACE).

The ACE platform provides a single, scalable, cheaper and more reliable solution to managing the back-office functions of multiple agencies, helping to improve government productivity for Singapore. Agencies benefit from enhanced governance and leading practices, greater ease of analysis, automation of manual processes and more empowered employees.

ACE is currently home to 19 government agencies and over 20,000 users. The platform has helped reduce cost and complexity while improving productivity, reliability and governance. ACE has cut overall IT costs by 30%, the automation of processes has reduced payroll processing time by 50% and the system maintains a 100% availability record.
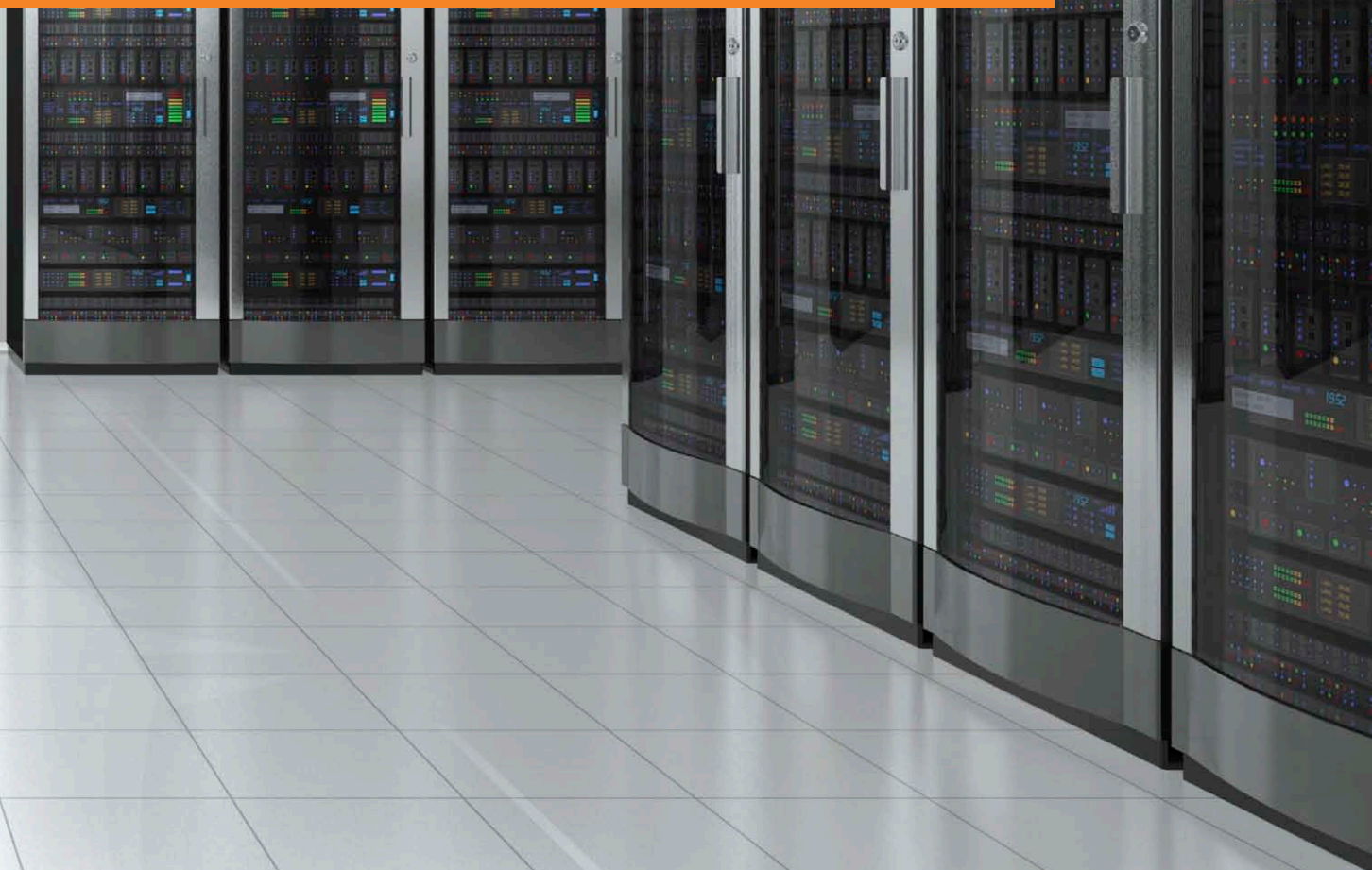
Building Capability that Enables Accessible High-quality Care

Think Big, Start Small, Scale Rapidly.

There are opportunities for government and providers to work differently and establish the seeds for industry wide change. Peak bodies and more advanced providers can help chart the course forward and provide a unified voice.

Providers need to rapidly develop a strategic response. They need to begin by evaluating their current ICT arrangements, and work with vendors and software developers to ensure they have the right capabilities in place. Providers will need to understand their unique challenges and define their own strategic plans for enhancing ICT capabilities. These plans should be scalable to meet the growing need for aged care services and integrate with industry wide solutions.

This process of capability building will likely vary across the sector as individual providers need to meet unique challenges depending on the needs of their consumers, workforce skills and the impact of government policy. To ensure this approach is successful, providers may need to involve board members and advisers with substantial ICT experience. Some providers may need to boost their ICT spend from less than 2% to 5% of gross revenue to provide a sound level of ICT investment that enables technology to play a vital role.

Government should focus on creating a framework that enables the industry to change and adapt, including consistent government policies and investments. In addition, government should work closely with the industry peak bodies to develop pilot programs and ensure the outcomes are shared across the industry. This requires a

scalable investment approach as opposed to the current ad hoc spending approach to aged care ICT investments.

Government can help foster investment in infrastructure for innovation and solutions that can be scaled across the industry, similar to providing seed funding and leadership as it has with Pharmacies and General Practice. Government may also take the opportunity to review the scope of information currently required and streamline reporting requirements and information access to ensure it becomes useful and affordable to the system.

Beyond financial support and initiatives from individual providers, governments and industry need to develop a 5-year plan to instil a high level of ICT capability across the sector. At present, many providers are not well equipped to effectively navigate an environment of growing demand for care and CDC. As a result, a concerted effort is required to lift ICT arrangements and improve the overall level of care delivered to aged care consumers.

Consistency and certainty should be a hallmark of this plan, rather than ad hoc spending that does not give providers the certainty they need to implement complex and expensive ICT solutions. Furthermore, there are a variety of views and voices across the sector, and it is important that key stakeholders are consulted to drive lasting change in ICT arrangements.

To kick-start a step change, we recommend the Federal Government create an innovation fund that would act as a short term incentive for providers. For instance, the Federal Government could provide seed funding for innovative programs that may be scaled across the sector. This would operate in a similar fashion to schemes delivered to GPs and pharmacists. In the long term, the aged care sector would need to fund its own ICT and innovation efforts.

Next steps

We recommend a number of immediate actions:

1. Develop the strategic plan and capability blueprint to clearly establish policy considerations, service capabilities, underlying technology requirements and target outcomes

2. Develop common ICT standards to support industry wide capability development and guidance for deploying the underlying IT solution requirements

3. Conduct a baseline evaluation to understand where industry providers are in their ICT journeys and prioritise resources and investment timelines

4. Commission proof-of-concept projects to build an evidence base for future investment and strategies. We recommend projects such as those listed in the key areas of 'Charting a Course for the Future'

5. Establish a resource pool to support the aged care providers and overall transformation effort. This pool would be used to provide skills and capacity where resources need to be deployed most urgently to support proof-of-concept projects or full deployments. This resource pool would need a combination of skills to provide support across business planning, technology and change support.

Conclusion

The current focus on industry reform – particularly through the Federal Government's 'Living Longer Living Better' package – provides an excellent opportunity for providers and government to expand their use of ICT.

ICT is a key enabler in allowing providers to deliver CDC and support PCEHR, including through the use of mobility, analytics and cloud based offerings. By taking action now we believe the industry can foster a steep change in capability over the next 5 years for all providers, regardless of their current level of ICT maturity.

A 5 year plan should focus on establishing sector wide capabilities for all providers. By the end of Year 1 all Aged Care providers should have a strategic plan in place to address their key capability gaps. By the end of Year 3 leading providers should have all their ICT requirements in place and use reporting and analytics to evaluate the business benefits. By the end of Year 5 all consumers/residents with chronic illness should have a functioning electronic care plan, and the aged care workforce would have 24/7 remote access to these plans and monitoring data (if applicable).

For all parties, the cost of inaction is high. If the aged care system does not embrace the use of ICT, it risks being unable to offer high-quality, accessible care. This could not only fail those directly involved, but result in additional adverse pressures on the Australian community in general.

By taking steps now to elevate the status of ICT, all parties can help create an agile and sustainable system that is well placed to meet Australia's aged care needs now and into the future.

Indicative Benefits

By improving the use of ICT, consumers, providers and government can gain substantial benefits.

Consumers

Consumers gain more choice and control over the services they receive, simplified access to services, and greater independence. Expected target benefits include:

- Improved consumer choice, control and independence leading to more older Australians living at home longer

- Reduced reliance on the acute hospital services by between 30-60%[3] for target consumers receiving Telehealth enabled services

- Reduced consumer travel between rural/regional areas to metro centres by 30%-60%[4] through ICT enabled services such as Telehealth.

Providers

Providers are able to better meet rising older Australian expectations through enhanced service offerings. Also, they can develop more sustainable and cost-effective business models, and collaborate more effectively with other providers and government. Expected target benefits include:

- Improved clinical workforce productivity by 20-30%.[5] On an industry wide basis this translates to resource capacity equal to approximately 45,000[6] additional care workers

- Reduced back office administration costs by 10-20%[7] through improved availability of core information systems and adoption of Software-as-a-Service procurement models

- Reduced clinical travel and associated costs by 15-35%[8] through ICT enabled services such as Telehealth and mobile workforce solutions.

Government

Government can use ICT enabled services delivery strategies to help address the unsustainable growth and cost projections in aged care. These ICT enabled strategies and solutions can help align industry and Commonwealth goals to enhance care quality and safety, improve productivity in the industry, and foster improvements to the cost effectiveness of services delivered. Expected target benefits include:

- Industry wide productivity improvements of 10%-20%[9] leading to more efficient cost management and associated growth of aged care forward investments

- Reduction of unnecessary hospital presentations and admissions by 30%-60%[10] improved ICT enabled service options for long term care (e.g. Telehealth, care through management).

For more information

To find out how your organisation can use ICT to provide high-quality services in an environment of consumer-directed care, please contact:

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Sources

1   Source Data: Productivity Commission report 'Caring for Older Australians', 8 August 2011, www.pc.gov.au/projects/inquiry/aged-care/report/key-points

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3   Source: Telehealth Pilots Program evaluation, ACIITC & Accenture, 2014

4   Source: Telehealth Pilots Program evaluation, ACIITC & Accenture, 2014

5   Source: Estimate based on 'HealtheCare Board Report', Hunter Nursing, 2013, 'Travel Smart Stay Safe: Internal Travel Study', Silverchain, 2011-2013 and 'The Dollars and Sense: Quantified Benefits of Technology in Community Care', David du Plessis, Healthcare Pty Ltd, 2013

6   Source: Estimates based on Productivity Commission report 'Caring for Older Australians'

7   Source: Accenture estimate based on benefits achieved from other consumers experiences (e.g. Singapore Government)

8   Source: Travel Smart Stay Safe: Internal Travel Study Analysis, Silverchain, 2011-2013

9   Source: Accenture & ACIITC estimates based on benefits identified for provider and client stakeholders

10 Source: Accenture & ACIITC Study based on Telehealth Pilots Program evaluation.

About Aged Care Industry Information Technology Council (ACIITC)

The Aged Care Industry IT Council (ACIITC) was formed by the two industry peak bodies, the Aged Care Association of Australia (ACAA) and Aged and Community Services Australia (ACSA), in 2007. ACIITC is the leading industry voice on how ICT can improve the operation of the aged care industry. Additionally, it provides ICT policy guidance to peak bodies, government and its agencies. www.aciitc.com.au.

Leading Age Services Australia (LASA), which replaced ACAA on the Council, is the peak body for age services in Australia, covering the majority of providers in both not for- profit and private organisations across all service types. LASA has offices in every state and national office in Canberra and a staff of 120. www.lasa.asn.au.

Aged and Community Services Australia (ACSA) is the leading national peak body for aged and community care providers and represents church, charitable and community-based organisations providing housing, residential and community care services to older people, younger people with a disability and their carers. www.agedcare.org.au.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with approximately 281,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US$28.6 billion for the fiscal year ended Aug. 31, 2013. Its home page is www.accenture.com.