

Welcome

Fraame continues to enjoy tremendous growth across its programmes in Australasia. 2008 has brought a number of exciting new projects in both Australia and New Zealand, which we profile in this issue of Future Vision. This includes new implementations in Brisbane, Australia and the capital city of New Zealand, Wellington.

Also in this issue of Future Vision, we profile the future of our FileVision programme (FileVision 5.0). Many of the new capabilities inherent within this release are targeted to enhance productivity, usability and coexistence with the business and office productivity tools we see across the global economy.

Not only are we fortunate in our programmes to assist organisations in the management of client, patient and customer related activities, but through the effective use of information and document management tools such as FileVision, we can assist in making a positive contribution to the environment. This is through the reduction in the amount of "physical" paper documentation created in our organisations.



Gavin Wright
Chief Executive
Fraame Solutions



What's Happening in Australia? FileVision Fast-Forwards to Finance

Market realities along with a visionary strategy have recently led Australian Company Super Plus Australia Pty Ltd to form a partnership with Fraame Solutions Limited. A successful young company formed and directed by Phillip Whiteley, Super Plus is an independent specialist provider of accounting, administration and compliance services to trustees and finance professionals handling their clients' superannuation savings. More specifically, Super Plus deals in the realm of self-managed superannuation funds, or SMSFs.

Fraame, on the other hand, has produced and operated its FileVision IT package predominantly for international application within health and social care sectors to date. However, the ideals it capably and practically fulfils for

optimising both client relationship and document management practice are increasingly being noticed by other sectors, including the financial sector.



Exactly which market factors are at play? Well, the baby boomers now bursting onto the superannuation scene in numbers set only to increase has seen business intensifying for accounting administration companies like Super Plus. For instance, as a greater percentage of the population enters the pension-drawing stage, each self-managed superannuation fund becomes suddenly more challenging to administer, with most funds legally requiring additional paperwork.

So - plenty of fund management-related work exists. An increasingly internet-informed and canny public realises that fund management carries with it many choices ... and potential pitfalls. The more people know, the more they understand the need to proceed with caution, and once they understand the network of regulations and compliance issues applying to their nest eggs, the better protection they seek. So, while SMSFs enjoy the lowest rate (maximum of 15%) of tax of any entity structure in Australia, they are surrounded by regulations. Failure to understand or comply can result in hefty fines or be classed as a criminal breach.

Sometimes even accountants don't have the time to adequately address compliance issues, according to Phillip. And that's where an ideal IT package like FileVision can offer both sophistication and streamlining to the Super Plus IT administration process.

FileVision will be a huge asset for both document and customer relationship management, he says, along with its ability to assist with triggering timely and appropriate workflow. The nature of some trusts and pension provisions means that, for example, one person might hold multiple roles within a single superannuation set-up.

FileVision's client relationship records are able to cope easily with addressing such complexity. It can trigger certain actions at the perfect time. It also offers a transparent yet secure web interface for clients, which Phillip believes will be increasingly demanded by SMSF customers. "It's the ability to lock down their own data that clients are wanting. FileVision offers that. It's a package able to track all data related to every person and each specific role held within a trust or pension fund. Ultimately, the data is theirs, and people are becoming more proactive about owning it. So in addition to assisting in compliance matters, FileVision will help Super Plus achieve its motto of 'Adding Value, Not Just Numbers.'"

Phillip's intention for Super Plus Australia is that it increase its market share. He sees the partnership with Fraame as

advantageous in terms of being able to grow his business “organically.”

“The biggest impediment to growth for a huge range of Australian companies is simply one of staff and skill shortages in specified locations. Using FileVision will enable our Super Plus staff to work remotely, as it will negate any document sourcing problems.”

Phillip enjoys the relationship with Fraame Solutions, and says he will always be first in line for it’s IT updates. “I always find Fraame staff extremely friendly, helpful and responsive,” he adds.



Old Treasury Building (now Casino), Brisbane

Welcome to the Future FileVision Version 5

Fraame and FileVision are delighted to announce the release in 2008 of FileVision version 5. In this article we touch on a number of the key new feature capabilities and comment on the implications at the end of the article.

Multiple company support was a key factor behind delivery of a range of scalability improvements. This functionality was needed to support multiple companies in a single database. This allows FileVision to be offered as an ASP or hosted solution for smaller organisations that do not want to manage their own server environment.

At first glance, the most notable change in FileVision 5.0 is the resizable GUI (Graphical User Interface). The elimination of the fixed size GUI gives us the look and feel of a more traditional Windows application. With the resizable GUI we now support large font DPI.

You can have multiple copies of the same or different forms open and viewable at the same time. Previously you would have to open a second client connection to view two FileVision screens at the same time. Now you can view as many copies of the same or different forms as you would

like. The resizable GUI allows users to take advantage of large or multiple monitor configurations.

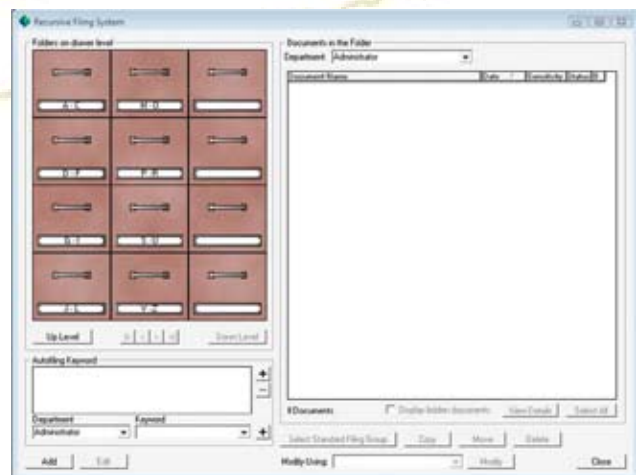
Another noticeable change is in the Filing Manager, recursive filing allows you to file documents at any level of the cabinet. You are no longer bound to the cabinet, drawer, file and folder filing structure, thus allowing you to configure a filing structure similar to traditional Microsoft Windows. This enhances the management of filing structures and eliminates the necessity of having folder levels to meet the four level requirements in the cabinet structure.

All that said, we have retained the legacy filing structure for those who prefer it. The user can still file at any level but it provides a conceptually easier view for non-technical personnel.

In terms of the Relationship Management functions of the FileVision application we have added a few new features like multi select extra data fields. This optional setting lets users select more than one item from an EDF (Extra data field) drop down. For example, if staff used an EDF called diagnosis, a user could select multiple types from the extra data lookups without having to duplicate the list in several Sub-Lookups.

You can now print and export to CSV the information on your notice board. This allows users to quickly create to-do lists or reports on the work they have in their Notice Board.

A new document pre-viewer allows users to quickly look through the results of a document search. Staff can open a document, view the individual pages and then jump to the next document of the search without ever closing the viewer. There is a progress bar for the individual document as well as the remaining search and a viewer button and document details. This allows users to quickly modify the document from the pre-viewer window. This comes in handy when you recognise what you’re looking for when you see the document but not from the document name.



Previously in FileVision, documents that were emailed out of the system were sent via a SMTP server. Now documents can be appended to an Outlook message. This allows users to use third party applications such as email encryption on documents that are sent out of the system. When a document is emailed out of the system, we now keep a history of who it was sent to, when it was sent and what was said in the email. This can be a very beneficial with all the regulatory issues surrounding corporations today.

FileVision 5.0 also has a new forms processing module, also known as zonal OCR. The forms processing module allows organisations to capture data off predefined templates of common forms that you scan in bulk. This functionality dramatically reduces keying while indexing documents.

Eforms can be viewed and filled out via the web client and documents can now be scanned from the web client.

What does this mean for current and prospective user of the FileVision product? In summary, the programme focuses on enhanced ease and use, compatibility and co-existence with other core business tools such as the Microsoft Office Suite and enhanced organisational productivity.

What's Happening in New Zealand? Constructing Organisational Clarity

Installing and understanding FileVision, a Fraame Solutions IT package, has been a leap forward for the Cancer Society's Wellington Division. That's according to Fiona Pearson, a Divisional Senior Manager, and self-confessed technophobe. As Manager of Cancer Support and Information for a region which spans Wellington, the Wairarapa, Nelson and Marlborough, Fiona admits she was reluctant to adopt any new technological system. But what initially sounded like foreign-speak has wound up streamlining procedures, saving staff time, and adding a layer of professionalism onto operations and record keeping. "Using FileVision to the extent we now do has absolutely spelt the end of our ad-hoc office practices," she says. "before this some staff kept notes very diligently and locked them down, while others would scribble things on scraps of paper while on the run. We were just so busy, that's what tended to happen. We all had different ways of capturing data. You'd find out, for instance, that a patient may have died, or their marriage ended, but others of us didn't know. We had no logical, systematic way of informing each other, or of asking another to follow something through. Compared with what happens now, our practices were unsafe and unaccountable." Already in place in the Canterbury/West Coast Cancer Society Division in 2006, FileVision as an



information and relationship management IT solution first came to Fiona's attention in early 2007. By August FileVision was also up and functioning in the Wellington office.

It's not difficult to understand why an organisation totally reliant on donations, private bequests and legacies could benefit from a streamlined IT system. Each of its equally weighted functions is about learning and informing as effectively and efficiently as possible. Firstly there's the funding of medical/scientific research, then the big public health promotion campaigns, and thirdly, support and information services to all those with cancer diagnoses.

Working within the latter field, Fiona says the majority of her staff are highly experienced oncology nurses and counsellors. In total, Fiona's divisional staff number 27. But the Wellington Society's reach under Manager Roger Taylor's leadership is substantially increased by work carried out by no less than 600 registered volunteers. Roger is similarly impressed with the FileVision technology. He's particularly pleased with the good statistics provided for the "multitude of things the Cancer Society does for patients after referral," and says such a system would have been a positive step forward if installed "years ago." Now, with a few touches of the keyboard, Fiona and her staff are able to tap into relationships the Society has with patients. These include, for instance, whether someone is in the patient and family support grant programme, or the counselling module, whether they receive the CanTalk newsletter, or even just whether they are waiting to borrow a particular book. Some diagnostic, welfare or documented counselling information is able to remain confidential or limited to a particular staff member, in line with a patient's wishes. The converse is also possible. One staff member can, using FileVision, make notes that another is immediately able to share, negating the need for lengthy emails or other inter-staff communications.

"Being able to capture all of this data is a real help with producing the best training for our volunteers," Fiona says. "And at executive reporting level, the software can easily provide us with our total funding figures and facts. We're now about to begin FileVision's roll-out to our other offices, which will be complete by the year's end." With phase two, the building of a volunteer-directed module, about to happen, the software's impact will shore up many further societal functions. This time Wellington's Assistant Divisional Manager is unperturbed. She's now FileVision's "greatest fan."



A Perspective on Health Power to the People

In previous Future Vision issues we've touched on the topic of power. The rise of the internet as an increasingly widespread and personal research tool has been a major component in building momentum behind a quest for more consumer control over health treatments and outcomes.

How can this consumer-led power drive be productively harnessed?

It's a question currently being acted on by the New Zealand Health IT Cluster, an alliance of forward thinking innovators in various fields of information technology design and enablement, business, academia, and policy.

Chief Executive of the Cluster, Andrea Pettett says the group has recently been working to mastermind a "solution concept" for an ideal infrastructure surrounding the exchange of consumer health information. The draft concept completed in June 2007 represents an in-depth look at improving information sharing and flow across the entire health-care sector. Such a solution would deal to the current problem of patients often suffering a degree of "fragmentation," or the possibility of non-collaborative inconsistencies in their medical care.

This fits neatly into the cluster's over-riding aim of 'reducing information fragmentation so that patients can have access to optimal care at the most appropriate time and place.' * To do this, the Cluster has studied the process of improving information systems within an episodically based health-care delivery model. This system is the status quo for chronically ill and ageing patients who typically have "multiple levels of engagement." That is, many have regularly scheduled appointments with different specialists who are insufficiently aware of treatments the other provides. Even the patient's general practitioner may not be sufficiently knowledgeable, after specialist advice and treatment periods, of the patient's ongoing progress.

There's a good efficiency argument for consolidating centrally and shoring up information gaps between different providers, in terms of reducing duplication and the time-wasting effects of reliance on old, superseded communication technologies like facsimiles. Efficiencies increase further if the new system can offer or dovetail into a holistic, transparent, easily accessible personal patient health portal.



In the Cluster's vision, health providers' storage of paper-based patient record notes quickly becomes a thing of the past. The focus is firmly on creating a well-secured Chronic Care Management Portal; one virtual archive that is fed patient notes by many different care providers. These then become available via a common user interface web portal. One pre-

requisite for this will be to somehow support and enable healthcare organisations and medical facilities to correctly image, index and archive their paper visit notes.

Who would have official access to such a portal? Users of the portal, the Cluster's Executive summary states, will be limited to authorised care providers, patients and their families. User Ids will specify those roles which define access, and a secure messaging layer will protect against anyone unauthorised from retrieving documents.

The Cluster is also promoting the fine-tuning of a project concept for the aforementioned Consumer Health Portal. The latter will have the potential to empower and improve life dramatically for regular health system users, particularly so for those who find themselves less mobile, increasingly isolated, or prone to forgetfulness about appointment and medicine schedules.

*A Health IT Cluster goal paraphrased from the web-site www.healthit.org.nz

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