



Act! and MYOB created a seamless billing system for healthcare service.

Caswell Health Care offer mobile physiotherapy, occupational therapy and speech pathology services to the Sydney Metropolitan area, supporting neurological rehabilitation, paediatric care and rehabilitation.



The Challenge

Caswell Health Care were looking for a way to improve the handling of their growing number of patient records. Additionally, they needed a better way to manage their billing process which was extremely complex and time consuming.

With no specific software to meet their needs, Caswell were looking for a CRM solution for their part-time, often mobile workforce who look after a diverse range of patients.

“The integration between Act! and MYOB is now seamless.”

Anne Ramsay, Operations Manager, Caswell Health Care

The Solution

Flexibility was the key concern when it came to finding the right solution. They needed an easy to use system that allowed patient records to be digitised in a way that replicated their paper based system so the team could easily find the information they were looking for.

“We were looking for flexibility,” said Anne Ramsay, Operations Manager of Caswell Health Care.

Caswell had originally purchased Act! online and installed it themselves. The team found Act! very easy to use, but felt they needed some customisations to further improve how they were using Act!. They called upon Act Today to help tailor Act! to meet their specific needs.

The Results

With help from our team, Caswell Health Care solved multiple problems within the business. They had digitised their customer records in a database that captures the necessary data, and their team had an easy-to-use, fast system that is accessible from anywhere.

“Through this system, each one of our clients has set up treatment goals. We are now able to track these goals and review patient outcomes. The patient feels they are receiving excellent service and achieving their rehabilitation objectives within predicted time-frames” explains Anne.

As a bonus, through integrating Act! with MYOB, Caswell were able to simplify and streamline their extremely complicated billing process. “The integration between Act! and MYOB is now seamless. We are now able to update contacts, view invoices, look up contacts and import MYOB items into Act! among many other things.”

Improvement Highlights

- ✓ Process Automation
- ✓ Team mobility
- ✓ Easy access to patient data
- ✓ Integration of systems
- ✓ Simplifying of billing process
- ✓ Easy access to patient data

“We were looking for flexibility”

Anne Ramsay, Operations Manager, Caswell Health Care



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