



## Module 7: Planning for tcm 7 – managing the change

Get prepared, but be prepared, for the biggest change to the software in 14 years. The all-new tcm 7 delivers a brand-new interface offering new features, enhanced functions and significant benefits to both users and management.

### 1. Welcome and Introductions

- Trainer intro
- Venue details
- Tea/coffee and lunch details
- Participants introduce themselves

### 2. PowerPoint Presentation – an overview

- Introduction to the new features
- Technical considerations
- Staff
- Testing
- Training
- Going Live

### 3. tcm 7 hands-on demonstration

#### New interface

A demonstration of tcm 7's new functionality and graphic interface. Navigation Pane, Search Pane, Results Pane, Task Button bar, Status bar and more.

#### New Global Menu Bar

- Easy access to all Switchboards from anywhere

#### New Switchboards

- Events
- Client Contacts
- Service Delivery
- Scheduled Events
- Calendar Notes

#### New task Bars

- Common to most Switchboards

#### Search & Filtering Tools

- Views button
- Context Menu
- Quick filter

#### Major feature: Calendar interface

- Client Diary (and Client Roster)
- Program Diary (and Program Roster)
- Group Diary (and Group Roster)
- Worker Roster

### **Roster Toolkit**

- Now part of tcm 7 (not a separately launched program)
- Many improvements

### **History screen**

- Custom options

### **Reporting**

- New look reporting screen

### **Other features**

- Team based Security
- Access Audit
- Document storage in database
- Scheduled Events
- Scheduled Fees
- Invoice Reconciliation improvements
- New online help: Global Menu > Help > Contents
- Documentation available at Bulletin Board

### **Migrated features**

### **Customisation options**

### **What hasn't changed?**

- Wizards
- Programs

## **4. Key benefits**

What's in it for me? Different users will have different reasons. Could include:

- New, easier to use interface
- Calendars (using improved service delivery model, better performance, easier graphical interface)
- Team Based Security increased performance
- Switchboards (migrated and new)
- Reporting features
- Improved Purchase Invoice Reconciliation
- Integrated Roster Toolkit
- SQL performance benefits
- Macros on Word templates often break – tcm 7 uses add-ins instead for increased stability.

## **5. Your business processes – getting the best from tcm 7**

- Evaluation / Functional Review – reviewing functionality against business process (i.e. Rostering person for Rostering tasks)
- Other issues surrounding a move to tcm 7
- Review of business processes and driving the change to tcm 7

### **Partial list of things needing to be gone through e.g.**

- Rostering
- Purchase Invoice Reconciliation (Confirmed)
- MDS Reporting (HACC, CSTDA etc)
- Diary/ Service Instances

## **6. Technical specifications and considerations**

### **Technical specifications including pre-requisites**

- Handout of technical specifications
- Who will be responsible in your organisation and how much time?

### **Steps involved**

#### **Operating systems supported**

#### **Migration of your existing 6.11.x database**

- Service Delivery migration (up to two hours)
- Templates, Wizards
- Team Based Security

## **7. Configuration required**

**Some manual configuration will be needed.**

### **Switchboards**

- Default actions i.e. Clients > Details (Set Default Action)
- Views
- Menus (Grouping and sorting, Context)
- Data templates
- History (html templates – global)

### **Items that were not migrated**

- Planned Service templates
- Switchboard preferences
- VINAH Contact Templates

## **8. Develop an upgrade plan**

- Document your upgrade plan!
- Document any changes to your business practices that will be introduced in tcm 7
- Regularly review your upgrade plan

## 9. Setting up a test environment

- Identify key personnel to do testing
- Establish a test environment
- Have a test plan
- Test key functionality
- Test your key processes
- Schedule the testing
- Send feedback to tcm support

## 10. Develop a training plan

- Discussion of staff knowledge and current use of The Care Manager, version 6.11.x.
- Plan training to coincide with introducing/launching of tcm 7.
- Types of training
- If required, schedule some training from DCA

### Training modules available

#### Module 8 – Super user session

Aimed at users who have been using The Care Manager (Version 6.11.x or earlier) for some time and who have a solid grasp of the fundamentals. It is hoped that the super user will inform and enthuse the general user back at the office and will take an active part in the organisation's transition to tcm 7.

#### Module 9 – tcm 7 update session

An edited version of a basic course but conducted in tcm 7. Designed for the existing (and experienced) user of The Care Manager whose organisation will be making the move to tcm 7.

#### Module 10 Course Outline: tcm 7 Basic

Designed for first-time users of tcm 7 software at organisations that use tcm 7 (but do not use the Programs module). The course presumes participants have had no prior exposure to The Care Manager software (versions 6.11.x or earlier) or tcm 7.

#### Module 11 Course Outline: tcm 7 Basic using Programs

Designed for first-time users of tcm 7 software at organisations that use tcm 7 with the Programs module. The course presumes participants have had no prior exposure to The Care Manager software (versions 6.11.x or earlier) or tcm 7.

#### Other modules under development

tcm 7 multi-shift rostering, database administrator etc.

## 11. Scheduling a go-live date

- From the test bed to the user's desk

## 12. Expectations...

### Our Expectations

#### Participate in training

- Mandatory training for Planning & Super User

#### Plan and document your upgrade

If you don't plan, things will go wrong; we will have to send you back to your plan before we can help.

- Start now!
- Work out timelines

#### Support for 6.11.x

Need to upgrade by December 2010. Support for 6.11.x will conclude on that date.

#### Components of upgrade plan: how TCM Support works for upgrading

- "Support" is not upgrading. We will require to see a copy of your upgrade plan. To enable the resolution of issues, tcm support will require a step-by-step guide as to what you have done.
- Severity of issues: there will be tcm clients with high, medium or low issues; high severity bugs that takes the server down for example take priority over templates not working because you haven't migrated them as part of the upgrade.
- How to report issues to tcm support
- Use the free Bulletin Board to ask questions or share experiences.

### Your expectations

- Documentation
- Upgrades
- Our response to your feedback.

\*\* END \*\*

Training content is subject to modification where necessary.

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