

Meal Delivery Software Shopper's Checklist

Courtesy of **MealService Software**

Compiled from experiences with a number of meal delivery organizations offering a wide variety of delivery and walk-in services, here are some questions you may find useful in helping to determine how closely a software package may accommodate your specific method of operation. This set of questions is focused on the meal delivery operation, with only tangential mention of other agency functions. Questions are grouped loosely by category.

This list is by no means complete, but it will hopefully provide you with a foundation upon which to base your vendor conversations. If you'd like to include MealService Software in your discussions, we'd be happy to discuss how MealService might be able to accommodate your needs.

Types of Services and Items

- Specify your methods of delivery
 - Delivered
 - Office Walk-In
 - Congregate sites
- Specify the types of delivered items
 - Hot meals
 - Frozen meals
 - Congregate bulk meals (i.e., steam-table)
 - Congregate individual meals (i.e., lunch bags)
 - Grocery bags
- Itemize the numbers and types of deliveries per day

Clients

- Do you have the need to identify clients who are members of a household, so that changes to one household member will be reflected in all household members?
- Do you require *Recertification* of your clients? (also see the Recertification section, below)
 - Will you need the ability to set the recertification timeframe?
 - What triggers the Recertification process?
 - What functionality will you require at the time of recertification?
- What unique demographic elements will you need to track?
 - State- or federally-assigned client numbers
 - Health status or specific disease condition
 - Other unique elements
- Will you need the ability to track affected or non-eligible clients?
 - How many categories will you require? (i.e., client, family, dependent, etc.)
 - Will you need the ability to assign your own category codes to the above groups of clients?
- Do you have the need to communicate with clients in more than one language?
- NAPIS
 - Do you need the ability to track responses to your organization's specific ADL and IADL questions?
 - Is the ability to trigger a follow-up based on a NAPIS score required?

Addresses

- Do you have a need to deliver to more than one address per client? For example, do you have the need to deliver to an alternate address one or more days a week if a client is at a clinic?
- Do you have the need to accommodate more than one route per client? For example, a client may pick up meals at your site one day and have those meals delivered the remaining days
- By which jurisdictions will you require aggregate service statistics? For example, will you need the ability to calculate units of service by ward, city, county, state?
- Will you tolerate address errors due to misspellings of city, county or state names or will you require that those fields be populated from a lookup table?

Special Meals

Organizations typically fall into one of two camps regarding special meals:

- Your organization prepares special meals every day for all of the clients with any type of diet restriction
- Your organization prepares special meals for only those clients who are actually affected by a day's menu. If you are in this camp...
 - How many separate meals will you need to track for identifying which diets are affected? (i.e., lunch and dinner, or only dinner)
 - Do you have the need to identify more than one special meal on a given day?
 - If using a *Special* label, does the label need to specify what makes that meal special?
- How will you need to identify the special meals and to whom they're delivered?
 - Color code
 - Personalized labels
- Will you need to historically track which were the affected diets each day?

Diet Identification

- Will you need to define the diets to match those your organization is currently using?
- If your organization uses color or other codes to represent a dietary restriction, will you need to continue to use those same codes?
- Do you need the ability to assign a separate diet or color code to a cold bag?
- Do you need the ability to track clients' dietary likes and dislikes?
- Will you have the need to accommodate more than one cuisine? That is, do you offer ethnically flavored menus?
- Do you need the ability to track meal texture (e.g. mechanical soft) as well as dietary modifications (diabetic, renal, etc.)

Delivery Labels

- Organizations tend to fall into one of two camps with regard to labeling deliveries
 - Will you require personalized labels for delivery items? If so, will you need to specify the number of labels each item will require? For example, suppose a grocery box requires two labels.
 - Will you require coded labels for delivery items? For example, many organizations don't personally address each item, but rather use a color code to indicate the diet.
- Will you require an addressing or coding system for cold items that is separate from that for hot items?
- Do you need the ability to print cold labels that include only cold items and hot labels that include only hot items?
- Will you need to select labels by a certain specification? For example, by a specific route, by distribution center, by service, by diet?

Menus

- Will you require the ability to print client-specific menus for delivery with the meals?
- Do you allow clients to select entrees or other items in advance from a menu?
- Will you require itemization of kitchen components by
 - Item (e.g., Hot Meal, Cold Bag, etc.)
 - Specific meal component (e.g. protein, vegetable, starch, beverage, etc.)
 - If this level of detail is required, will you also require the ability to assign specific component substitutions at the diet-modification level, and then be able to count those substitutions?
- Will you require the ability to plan and store menus by season or other time period?

Recertification

- Some groups recertify their clients periodically. Do you follow that practice?
 - If so, what functionality do you need to trigger when a client is due to be recertified?
 - Elapsed time since intake
 - An arbitrary trigger (such as by last initial or delivery route)
 - Who needs to be contacted?
 - The client

- The case manager or some other referral source
- Will you need the ability to automatically stop a client's service based on
 - an arbitrary number of days of service
 - inability to meet certification requirements
 - a contract expiration date

Delivery Items and Frequency

- Will you require the ability to identify the source or origin of a meal for specific clients? For example, do your meals come from more than one kitchen, and must be tracked so?
- Do you have the need to schedule deliveries on an intermittent or irregular basis... for example, delivering a birthday cake, pet food, blizzard or hurricane box, or a case of nutritional supplement?
- Do you need the ability to schedule more than one delivery per day per client, perhaps on different routes?
- Do you offer a service that is delivered on a limited number of days, for example Wednesday through Saturday? Will you need the software to enforce those limited delivery days?
- Do you have the need to customize the items a client will receive?
- Do you have the need to record intermittent or irregular deliveries or walk-ins, such as pantry service or congregate walk-ins, or an every-other-week delivery?
- Do you need to record bulk deliveries, such as steam table trays to a congregate site?
- Do you need the ability to track capacity by congregate site and limit the number of clients at a site?
- Will you require the ability to create ad-hoc groups of clients? For example, a subset of clients to whom additional items may be delivered once a month.
- How do you handle rescheduled holiday meals? (i.e., when an extra meal is delivered in advance of a holiday)

Routing

- Do you require clients to appear on Route Sheets even if they are temporarily removed from deliveries?
- Will you need the ability to easily move batches of clients from one route to another when reorganizing routes? This may be important when you are defining new routes, or have an agency that is rapidly growing.
- Will you need to easily produce maps with driving directions for each of your routes?
- Do your routes originate from more than one location? That is, do you need to support Distribution Centers?
- Do you require the ability to assign a client to a different route occasionally, perhaps because the client does not get along with a volunteer driver?
- Will you require the ability to assign drivers to routes and track driver statistics?

Units of Service Statistics

- What do you consider to be a unit of service?
 - A delivery or walk-in
 - Number of meals
 - Both
- Missed deliveries
 - Will you require that missed deliveries be logged?
 - Will you have a need to categorize the reason for missed deliveries?
 - Is there a consequence of having missed X number of deliveries?
- Service suspensions
 - Will you require historical records of service suspensions?
 - Will you require categorization of reasons for service suspensions?

Reports and Queries

- Do you require the ability to create your own reports?
- Will you need the ability to email or archive the output from a report?
- Will you require the ability to query the data as needed, using your criteria?
- Will you need the ability to easily create mail merges to selected recipients?

Funding/Billing

- Do you have a need to generate donation requests to your clients for a 'pledged' amount per meal?

- Do you need to be able to track pledged amounts for different items? For example, do you ask your clients to pledge different amounts for a meal versus a nutritional supplement?
- Do you have the need to bill
 - Funders? What service statistics are required to produce those bills?
 - Summarized quantities of meals per day or month
 - Itemized meals by date
 - Clients? Will you need to bill the client for a portion as well as a funder for a portion?
- Will you have the need to track different reimbursement rates for different funding sources?
- Will you need to record the date a meal is to be consumed (as opposed to the date it is actually delivered)?
- Do you need the ability to assign different funding sources to different meal items? For example, are nutritional supplements and meals funded differently, or meals funded by day-of-the-week?
- Will you need to 'split bill'? (That is, to bill a portion to an external funder and a portion to the client)
- Do you need the ability to email your client invoices?
- Do you want to automatically charge a client's credit card for the amount of their invoice?
- If you accept private-pay clients, do you need a full accounts receivable module with the ability to generate aged receivables?
- Do you need to be able to automatically shift a client from one funding source to another as of a given date?
- Will you need the ability to issue a credit for a meal to a client for any reason?

Other Functionality

Do you have the need to automate other client processes? For example:

- Client intake
 - Will you need the ability to track the status of your intake documents?
 - Will you need the ability to replicate your current intake documents in the client management software? (i.e., eligibility conditions, etc.)
 - Do you want your clients to complete their intake documents online?
- Nutritional Counseling
 - Will you need the ability to track Counseling sessions?
 - Will you need an analytical tool to quickly identify those clients most at nutritional risk?
 - Will you need the ability to store client health information?
 - Weight at specific points in time
 - Hospitalization and other events
 - Nutritional and health data such as cell counts, BMI, etc. Will those trackable elements need to be customized to match the data you collect?
- Client Surveys
- Volunteer scheduling

Properly implemented, volunteer scheduling requires as much flexibility and sophistication as the core meal delivery software. For example, the ability to store default volunteer days, preferred delivery routes, preferred task, etc. The ability to temporarily suspend a volunteer for one or more days (due to a doctor's appointment or vacation, for example) and easily reassign them to a new temporary day. The ability to log volunteer hours. The ability to track a group of volunteers, such as a church group, etc.

Architectural Issues

- A fundamental decision: on premise versus in the 'cloud'
- If you have remote locations, should those locations
 - Share one organization-wide database
 - Maintain separate, local databases that are consolidated on a batch basis
- Will you require remote access from satellite offices or congregate sites? If so
 - Through a cloud/web-based system
 - Through terminal services
- Will you require access from a laptop: either by synchronization or web access?
- Delivery verification
 - Do you need to retain proof of delivery? Some methods to consider are
 - Having clients sign the delivery route sheet
 - Electronically signing using a hand-held device (such as a PDA)

- Recording meals at a congregate site
 - Immediately, using a computer located onsite for recording of the meal. Methods might include
 - ID card with barcode to be scanned
 - ID card with magnetic stripe to be swiped
 - Conventional data entry
 - Recording manually for later input. In this case some solutions include
 - Barcode scanner with memory
 - Paper-sign-in sheet with barcodes (for later scanning in the office)
- Will you need the ability to import service statistics directly into state-mandated reporting software?

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