



Case Study

CARDON TRACKING AND REPORTING TRANSFORMED BY POWER PLATFORM

The Situation

With operating procedures changing fast due to the coronavirus pandemic, CarDon needed to ensure the safety of its senior living community residents and associates by employing a comprehensive testing, tracking, monitoring, and compliance solution.

Tom McClelland, Chief Technology Officer for CarDon noted, "When COVID-19 reared its head in March 2020, we immediately needed a way to more efficiently test, track, and report testing of associates and residents in our over 20 senior living centers. We were managing these tests with Excel spreadsheets, and that was a painful process."

"I come from a very traditional software development background, where we spent a lot of time building everything from scratch. After contacting 20 or more vendors, I was intrigued when Leaf presented Microsoft's Power Platform, a low-code solution to our business problem."

The Solution

"My goal was to show CarDon that there is a different way to think about technology. I saw this as an opportunity to test out Power Platform, and to see how CarDon handles software development with two-week sprints, testing, feedback loops, and involving people in the company who have not experienced software development before."

Enter Amber Iskander, Executive Director of Human Resources. Amber had a business problem all her own.

Her existing Career Ladder program, which tracks certifications and continuing education for CarDon associates, was also mired down in Excel spreadsheets filed away within employee records.

According to Amber, "Historically, we tracked everything with spreadsheets. After seeing what Tom built with CATTS (CarDon Applied Tracing & Tracking System), I thought we could apply the same principles to Career Ladder. I needed a method to track all of the associates who were not only interested in, but also earning certifications. I also needed to know if the program was working. If I did not have an effective tracking system, I would not be able to provide meaningful information. After speaking with Tom, we decided on a tracking system with the same look and feel as his solution."

"Prior to this new tracking system, a completed certification would only be placed in the associate's HR file. We could not readily see how many associates had what kind of certification, or when the certifications were due to expire. Now, all that information is visible. It's always a good story to tell when we have increasing numbers of associates earning certifications."

Tom added, "There is a career path to become a registered nurse, plus tuition assistance is available. The system can track that continuing education progress over years. I can't imagine having to try to do that in spreadsheets."

Regarding the development process with Leaf, Amber stated, "I have never been through an app building process like this before, and Leaf made it easy with regular communication, and by walking me through the

process. As a result, we have an excellent product that we call REACH. It rolled out faster than I anticipated, and our associates have picked up on it very quickly. Our Career Ladders program continues to grow as a result, and I'm confident we'll build upon its current capabilities."

The Results

At the height of the pandemic, the COVID testing and tracking application made getting through the chaos and stress of daily reporting much easier on CarDon communities. Amber stated, "With spreadsheets, there were times when I was in tears with frustration because numbers weren't coming out right. We had strict demands from the state to report accurate numbers. And requirements changed every week. With the CATTs system, accurate numbers were right in front of us, shown in real time. This made meeting the state's requirements seamless. Plus, it was much easier to maneuver when the state changed their requirements."

"Having the COVID tracker application provided the ability to quickly, easily, and accurately pull the numbers and reports we needed. That took a big burden off of everybody. It was huge for us to be able to use the new tracker app especially in that chaotic time. When I think back - I don't even know how we did it really - but we pushed through and got it done."

Tom added, "In the midst of a pandemic, we rolled out two pivotal software applications in a way that has never been done at CarDon. Managing these tests with Excel spreadsheets quickly turned into a working application (CATTs). At one point, we were communicating daily with our resident's family members through a public facing dashboard. This was very important to the families to have access to this information for reassurance."

"We have about 150 users on Power Platform, and we designed the solutions so our users don't have to log in every day. We want systems talking to systems, with automation on top of our existing solutions. We make it simple to interact through automation."

"We intentionally built these solutions to be flexible enough to have the ability to track other things. We're only at the starting point, and we anticipate building a much more robust system. We can incrementally improve the existing Power Platform based applications to provide the features we need."

CarDon enjoys capabilities of the solution including the executive dashboard, individual compliance and monitoring, test tracking, system generated alerts and reminders, 360-degree views, as well as field level auditing. By using the Microsoft Power Platform, the developers at Leaf created a solution that may be repurposed and customized to add value to other areas of the business and to track virtually any process, such as policy and procedure testing, compliance, and skills testing.

Tom concludes, "The pandemic gave all of us a common cause and a battle we had to all get through. With my military background, I saw similarities fighting the good fight against tremendous odds. By going through this process, we were able to see what technology can do in a much different way. By providing these tools to our associates on the ground, I felt I was immediately contributing and enabling our communities to work more efficiently – even to the point of giving some time back to our staff to be with residents who had no loved ones around under the circumstances we endured."

About CarDon

With 20 communities owned, operated or managed in the Midwest and more than 40 years of senior living experience, CarDon & Associates provides residents - our family - with the best senior living options and personalized care. It is family-owned with main offices in Bloomington and Fishers, Indiana. Learn more at www.cardon.us.

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& ASSOCIATES INC.
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