LifeLong ADVOCACY

Using DocumentLOK™ to quell the sea of paper and devote more time to helping every client live a more independent life

CHALLENGES

Within two years of opening the doors to LifeLong ADVOCACY for the first time, Executive Director Kathleen Bielinski realized she had a problem. She had no more room for her paper files. Within these two years, her staff had grown from five employees to twelve, and they had brought in hundreds of clients.

As a Fiscal Intermediary for special needs residents of Macomb County, Michigan, who receive benefits through the Community Mental Health program, LifeLong ADVOCACY processes *a lot* of paper. Twice each month, the staff receives time sheets for each caregiver and/or service provider for each Lifelong ADVOCACY client. After the time sheets and progress notes provided by the caregiver or service provider have been processed, these documents must then be filed and retained for seven years, as prescribed by law.

> "The sheer volume of archived files was overwhelming. Something had to give — and we were not going to let that be the quality of service we provide to our clients."
>
> Kathy Bielinski, Executive Director
> LifeLong ADVOCACY, Inc.

Prior to implementing a document management system, these documents were filed in paper files by client, in date order. If any questions ever arose about a past time sheet or billing, staff would need to manually pore through these files until they found the client, provider, and time sheet in question. Worse yet, when the state auditors came to visit, they would provide staff with a list of 300 randomly-chosen line items out of the thousands processed each month. The source documents would need to be retrieved and manually verified against the amounts that had subsequently been billed to Medicaid, then manually refiled.

Every six months, due to limited filing space, LifeLong ADVOCACY's active files would be moved to a storage area to make room for the next six months' worth of documents. The only problem was that the storage area would accommodate only twelve boxes, and LifeLong ADVOCACY had been filling eight boxes every six months — and this number was growing as fast as their client base.

DocumentLOK™

SUCCESS STORY
overview

INDUSTRY
Community Mental Health Contract Provider, Fiscal Intermediary Services

CLIENT PROFILE
LifeLong ADVOCACY is a 501(c)(3) nonprofit agency serving as a 3rd party billing agency that processes payroll for consumers who participate in the CMH Self-Determination program.

Appointed by Macomb County Community Mental Health, LifeLong ADVOCACY acts as both an advocate and fiscal intermediary for persons with disabilities who choose to hire staff independently of an agency to assist them with daily living.

GOALS
Reclaim floor space wasted on both active client files and archived files

Reduce time spent processing paperwork and retrieving documents

SOLUTION
DocumentLOK™ Document Management Solution from Bull Valley Software

BENEFITS
All new documents are scanned, indexed, and digitally filed as they come in.

Three years of archived files are gradually being scanned in, freeing up more and more floor space every day.

The time required to access documents has been significantly reduced, giving staff more time to help their clients.

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SOLUTION

In early 2014, Kathy and her staff began the search for a document management solution. Kathy was adamant that she was not going to sacrifice quality for price, but as a 501(c)(3) nonprofit agency, the budget was still a very real consideration. Lastly, since this was LifeLong ADVOCACY's first foray into the world of document management, the chosen system had to be easy to learn and easy to use. Was it possible to strike a balance between quality, price, and ease of use?

The short answer is, "yes." Kathy and her staff evaluated three products from three vendors. They received demonstrations from each and then compared the quality, price, and ease of use for each product. The staff chose the DocumentLOK™ solution from Bull Valley Software because it not only the most comprehensive, but also the most flexible — able to be customized to the very specific needs of LifeLong ADVOCACY. "We have a very specific product, and very specific needs," Kathy said. "Bull Valley's customized implementation was critical; no canned implementation would have worked for us." Budgetary concerns and ease of use were not forgotten, either. Kathy adds, "DocumentLOK was very easy to learn and use, which was very important as we grew. The fees were reasonable, too."

THE RESULTS

In the first six months of use, the staff at LifeLong ADVOCACY has been able to not only keep up with the rapidly-increasing volume of paper coming through their doors, but also scan in around one-quarter of their boxed, archived documents. "There is light at the end of the tunnel, and we are looking forward to reclaiming all of that wasted space," Kathy states.

Accessing previously-processed documents is much faster for Kathy and her staff. Ideally, her staff should not have to refer back to the source documentation very often. When they do, though, "the time saved is significant," according to Kathy.

Did LifeLong ADVOCACY make the right decision? Kathy's answer is a resounding "Yes." Kathy concludes, "It has been a great experience. The DocumentLOK product is easy to work with and very flexible. Everyone at Bull Valley has been very helpful and pleasant to work with. They really listened to our needs and concerns."

"Bull Valley's after-sale support has been great. They are always available for questions and able to provide assistance when we need it."

Kathy Bielinski, Executive Director
LifeLong ADVOCACY, Inc.

Kathy's Top 3 "Likes":

1) Ease of Implementation
2) Short Learning Curve
3) Great Support

Bull Valley Software
At-A-Glance

Bull Valley Software, Inc. is a premier provider of document capture, document management, workflow management, and regulatory compliance solutions. By integrating with virtually any Windows® or web-based application, DocumentLOK™ maximizes your existing technology assets by providing immediate, single-click access to all of your electronic documents and files from within your primary business applications. Recognized as one of the most comprehensive solutions offered today, DocumentLOK™ combines secure document , compliance, and business process management in one enterprise application, giving you the power and flexibility to adapt to the ever changing regulatory and technological landscape of today's global business environment.

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