DocuWare

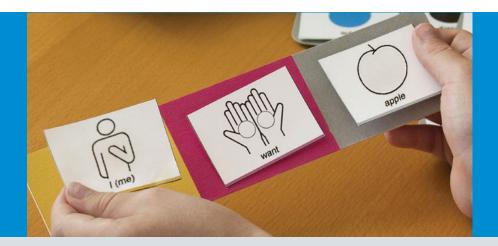## QSAC

Case Study

Serving the Autism Community

New York autism service provider, QSAC (a nonprofit), implemented DocuWare to better manage financial records and speed invoice approvals through a complex process. Electronic workflows allow the organization to streamline its approval process through a pre-determined workflow. QSAC was also able to increase transparency in allocating funds from different donors, agencies and grants, as well as easily provide auditors with requested information.

Quality Services for the Autism Community known as QSAC is a nonprofit that supports children and adults with autism. The organization helps over 2,000 families in Queens, Manhattan and Long Island with programs and services including early intervention, pre-school, day school, after school and respite care as well as adult group homes, skill development programs and other in-home services.

QSAC pursues its mission through direct services that provide supportive and individualized settings for children and adults with autism to improve their communication, socialization, academic, and functional skills.

Quality Services for the Autism Community

Industry: Nonprofit

Location: New York, USA

Application: Company-wide, Accounts Payable / Accounts Receivable, Electronic Workflow, Personnel Files, Patient Records

Document Types: Financial Records, HR Documentation, Client Files

Requirements

As a nonprofit QSAC is funded by many different sources and faces very stringent requirements regulating the use of its funds. With over 1,500 employees and a budget of $55 million, it is essential to monitor complex accounting processes and allocations, as well as oversee grants and donor money. QSAC had previously invested in a document management system but found that the system lacked the sophisticated features they needed. They knew it was time for a more comprehensive solution.

QSAC wanted to implement a solution that could be tightly integrated with FundEZ, a financial and accounting software for nonprofits, and would allow them to automate indexing, improve document security, as well as create custom complex approval workflows.

The Tasks

- Make funding allocations from donors, agencies and grants more transparent

- Implement an electronic invoice approval workflow

- Simplify audits and improve document security

Solution

QSAC met with an Authorized DocuWare Partner, Atlantic Tomorrow's Office, to learn more about Docu-Ware. After evaluating several systems they moved forward with the team at Atlantic who seamlessly integrated DocuWare with their accounting and HR software and they haven't looked back.

QSAC receives most of their invoices electronically. DocuWare works in the background to monitor the accounts payable email, extract the invoice and bring it into DocuWare. The documents are indexed using DocuWare's Intelligent Indexing Service which automatically searches each document for relevant index terms, such as vendor name, date, amount and etc. The accounting staff confirms the suggested information or improves it by clicking on the information to be indexed. The service uses crowd sourcing so once an invoice from a certain vendor is mapped with index terms, the template is automatically available behind the scenes to help index other documents with a similar layout. The service "learns" how to index documents thereby streamlining the indexing process.

Once indexed, invoices are automatically routed through a multi-level approval and allocation process. Upper level management has the power to veto lower level approvals and any staff member with access rights can electronically staple additional information to an invoice. Once an invoice is approved, the check is created and physically and digitally printed in order to automatically store the electronic version of the check in DocuWare.

Applied Modules

- Smart Connect

- Task Manager

- Intelligent Indexing

Benefits

DocuWare is tightly integrated with FundEZ. The accounting staff can access an invoice or other document stored within DocuWare, with a click of a button without ever leaving their familiar FundEZ environment. For example, when processing or reviewing a payment, with one click on the integrated DocuWare button, the accounts payable clerk can bring up all the documents related to that check.

"We always wanted to be able to fully integrate our finance software with our electronic documents, but we could never achieve this with our old system. With Atlantic, Tomorrow's Office as our partner, providing us with the vision, technical support and training from day one, we had complete integration between FundEZ and DocuWare and now we have no more need for paper," said Lou Costa IT Director for QSAC.

The approval process is very transparent even with employees at multiple locations and complex approval workflows. QSAC loves the flexibility DocuWare offers by allowing the workflows to be changed to meet emerging needs and requirements.

The installation process was virtually seamless. QSAC started routing and storing information in DocuWare. Their previous document management system was accessed only when a request came in. After one month, their Authorized DocuWare Partner, Atlantic Tomorrow's Office migrated all the documents from their old system into DocuWare with zero interruptions in their work processes.

"Once all of our records were in DocuWare we never accessed our old system again. DocuWare is so much easier for the staff to use," said Costa.

Since their funding comes from many sources, QSAC is audited by numerous organizations. Audits are now quick and painless for the staff because requested documents can be accessed and printed within seconds.

The Benefits

- Work processes have been simplified with seamless integration of DocuWare with accounting and HR software

- Zero installation interruptions

- Customizable electronic workflows, streamline business processes

- Managing multiple audits is quick and painless

- Permissions based security features help QSAC meet confidentially requirements

Conclusion

"We are just scratching the surface with how DocuWare can help us better control and manage information. We are continually working with Atlantic, exploring other areas where it can benefit us," said Costa.
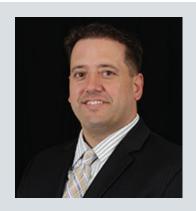
One of the areas where DocuWare is making a difference is in Human Resources. Today, HR files such as applications, I9 forms, discipline write ups and more are accessible from within FinancialForce HCM, the organization's human resource software.

The solution has also been expanded to securely store client files. QSAC loves the way DocuWare's pre-determined access rights help the organization meet confidentially requirements. QSAC's DocuWare solution is an integral part of their IT infrastructure and will continue to expand and simplify their work processes so QSAC can focus on supporting families affected by autism.

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