

Case Study: Advocacy, Inc.



Advocacy, Inc. Reduces Cycle Times, Error Rates and Costs with Formatta

Quick Facts

Organization

Non-profit dedicated to protecting and advocating for the legal rights of Texans with disabilities

Challenge

Convert complex paper forms to an electronic platform and optimize related business processes to reduce data errors and to save time and money

Why Formatta

Advocacy, Inc. chose Formatta because of its ease of use and integrated features

Benefits

Advocacy, Inc. reduced cycle time on expense reimbursements by over 85% resulting in increased employee and consultant satisfaction and cost savings



Advocacy, Inc. is the federally funded and authorized protection and advocacy system for Texans with disabilities. Advocacy, Inc. was founded in 1977 and is headquartered in Austin, Texas. Advocacy, Inc. believes that people with disabilities have the same rights as other citizens to freedom, equality, equal protection under the law, and control over their own lives. These rights must be honored if individuals with disabilities are to be fully included as valued citizens in the relationships and opportunities of community life.

The organization supports people with disabilities in their efforts to experience full participation and benefits of community life through individual casework (including litigation); class action litigation; technical assistance to private attorneys representing individuals with disabilities; development and dissemination of materials on a variety of community integration issues; training for individuals, family members, advocates and professionals in the field; collaboration with individuals and organizations with expertise on community living and person directed services; and advocacy for public policies and funding that support quality community living opportunities and experiences for individuals of all ages and across all disabilities.

"Formatta's solution is so easy to set up and use. We reduced our cycle times on some forms-driven processes by over 85%."

Complex Paper Forms Drove Advocacy Business Processes

Advocacy, Inc. turned to Formatta when the processing of complex paper forms began to disrupt their internal expense approval and reimbursement process. Field office personnel were filling forms out manually, faxing and overnight mailing to a central office for approvals, and many times had to repeat the process because of errors completing the forms. "We had some super complicated forms that were a nightmare to complete correctly," said Carlton Whitmore, a systems analyst for Advocacy, Inc.

Results

Reduced Cycle Times

85% reduction in staff time related to completing and approving various forms

Eliminated Manual Processes

Completion of forms, routing and approval signatures are all electronic

Improved Accuracy

Error rates reduced from over 90% on initial submissions to less than five percent

Expanded Usage

Key processes in human resources and accounting moved onto the Formatta solution

About Formatta

More than just an electronic version of a paper form, Formatta's solution quickly captures, verifies, approves and integrates data used in enterprise processes with the business critical enterprise systems used to run organizations.

Rich Blend of Features and Value

According to Whitmore, Advocacy evaluated solutions available in the market for nearly two years before selecting Formatta. "Nothing else on the market had all the features we needed at a price that made sense for a non-profit. Formatta's easy deployment, electronic signature capability and ability to easily integrate with our accounting and database systems drove our decision for Formatta," Whitmore said.

Designer Integration With Existing Forms

Advocacy, Inc. also chose Formatta because the Formatta Designer module makes it easy to drop in existing forms and to get them integrated into an optimized workflow quickly. Additionally, Whitmore was further impressed that Formatta's solution was Section 508 compliant since the organization works employees and partners who have disabilities.

Advocacy, Inc. Expanding Usage of Formatta

After the initial deployment of Formatta for expense requests and a daily travel log, the organization has broadened the usage of the Formatta solution to optimize forms-driven business processes in human resources and accounting. Forms including overtime requests, consultant agreements, direct deposit requests, training logs, leave forms and tax exempt forms have all been optimized and moved to the Formatta platform. Whitmore has plans to integrate Formatta with the organization's accounting system and database.

Results – Reduced Cycle Times, Costs and Errors

"By implementing Formatta, we have been able to improve internal satisfaction by processing expense reimbursements faster, reduced costs by saving staff time due to submission errors and have taken a form that used to take up to two hours to complete and reduced that to under 10 minutes. Formatta is an impressive solution," said Whitmore.

