

Representative Payee System Streamlines Reporting, Improves Productivity, Enables Agency Growth

IMAGINE THE POSSIBILITIES, INC., MAQUOKETA, IOWA

Imagine the Possibilities, Inc. provides quality community-based services to people with disabilities. A not-for-profit agency that is governed by a Board of Directors, Imagine the Possibilities, Inc. offers both employment and residential services. People served are assured of individually designed services that enhance capabilities in environments that tolerate only dignity and respect for all.

In July 2016, DAC, Inc. merged with 2 different agencies to become, as of January 2017, Imagine the Possibilities, Inc. At present, Imagine the Possibilities, Inc. serves approximately 450 individuals in several different programs and employs 521 dedicated staff.

Imagine the Possibilities, Inc. receives its revenue from county, state and federal funding, as well as donations from citizens and businesses.

THE BUSINESS CHALLENGE

Imagine the Possibilities, Inc. provides 240 of its clients with financial management assistance, such as income and expense tracking and invoice payments. The organization had been using a representative payee software for this service, however there was an issue with getting the vendor to support it.

“We need to create reports for the Social Security auditors that contain the exact information they are looking for in the format that meets their needs,” said Mary Bartels, representative payee director at Imagine the Possibilities, Inc. “The previous vendor was unable to provide someone to sit down with our staff and help not only create and customize reports, but utilize its product to its full advantage.”

When Bartels joined DAC, Inc. in 2013, she came from the Jackson County Office, where she used a simple accounting system for their representative payee services, until she found a more powerful and efficient solution that easily managed their growing client base --- the AccuFund Representative Payee solution.



THE ACCUFUND SOLUTION

“I told the executive director if he wanted me to join the agency as the Representative Payee Director they would have to install AccuFund,” joked Bartels. “AccuFund gets the job done. When I first looked at it, I gave the reseller, Don Erickson at NFP Solutions, a long list of desired capabilities. To my surprise, the AccuFund Representative Payee software provided all the solutions plus other features I hadn’t considered. It actually surpassed my needs. After talking with Don, it was an easy decision to go with AccuFund.”

Imagine the Possibilities, Inc. has reports it needs to create for the Social Security auditors on both a monthly and annual basis. Using AccuFund, Bartels has found that reports such as her annual payee report, which once took several hours to do, can now be run in five minutes.

“To do the payee report, it would take at least half a day to go through an entire year’s worth of checks,” explained Bartels. “As a result of the substantial time savings from running reports in



AccuFund, we've been able to experience rapid growth in our client base in recent years, and we are able to continue to take on and serve more clients."

The optimal efficiency, flexibility and speed that AccuFund enables has allowed Bartels to create reports with the format and specific data the auditors require as well as deliver them in a timely manner. The directors of Imagine the Possibilities, Inc.'s 50 group sites will also have access to AccuFund to view and look up any financial information they may need for a resident, such as whether a bill has been paid. As a result, they are not contacting Bartels every time they need this information.

"The AccuFund system allows us to be the most efficient we can be," said Bartels. "The system's organization and sorting capabilities have saved us so much time by making it quick and easy for us to find the information we need."

FULL BENEFITS OF ACCUFUND

Bartels and her colleague who also uses the AccuFund Representative Payee solution have found it to be very user-friendly, intuitive and quick and easy to learn. They both like that reports which once took hours, and even days, can now be generated with the click of a button, freeing up time for other tasks.

When doing reports on individual clients for Social Security, Imagine the Possibilities, Inc. needs to report the month end balances for the entire year to show they are not going over the \$2,000 per month resource limit.

"Before using AccuFund, we would have to create one report for each month and then print all 12 months separately," explained Bartels. "Now, we have just one report. We enter the date range that is needed, click it and get a report on that individual for the past year on one sheet that shows ending balances for each month."

"AccuFund offers so many possibilities that we're often thinking of new ways to use it," said Bartels. "When the bank changed the layout of how the benefits come into our collective account, we had to manually enter deposits for 240 people, which took two people 8-10 hours to do without errors. Now, it literally takes just five minutes to import the deposits in AccuFund."

Erickson and NFP Solutions have provided tremendous support by creating the time-saving reports. "Any time I call Don and ask 'Do you think it's possible to create such-and-such report?' we'll get on a web conference and he'll help me build it," said Bartels. "He's a wonderful support system."

AccuFund has also helped Imagine the Possibilities, Inc. save time with a debit card program that was implemented in 2015. AccuFund automatically loads funds onto debit cards for clients through an interface with the bank, and it enables repeating monthly expenses to be automatically debited without having to be reentered each month. The debit card program has also allowed Imagine the Possibilities, Inc. to save on printing costs for check stock, as checks no longer need to be written to provide funds to clients. Also, staff no longer needs to spend time each week distributing checks to the clients, as the funds clients need are on their debit cards.

"I'm not sure I would be able to coordinate the debit card program without AccuFund," said Bartels. "We can manage the program with minimal steps and can easily generate a report on how much has been loaded and debited on the cards."

"With AccuFund Representative Payee, we've been able to work smarter, not harder, and save so much time that we can now manage more clients," concluded Bartels. "We couldn't have 240 clients if we didn't have AccuFund. It allows us to be more productive and grow our business."

TO LEARN MORE ABOUT ACCUFUND

Visit our Website at www.accufund.com, call your local reseller, or contact our Sales Department at **877-872-2228**. We would be pleased to discuss this case study, explain the benefits of AccuFund for your fiscal department, and put you in touch with a local reseller certified to install and support the **AccuFund Accounting Suite**.