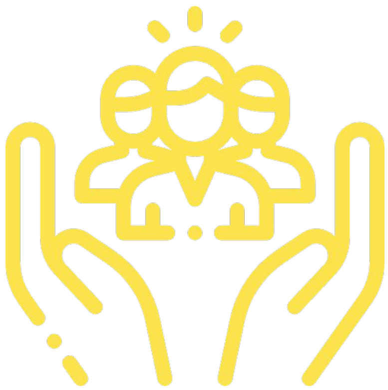
MANAGING YOUR NON-PROFIT WITH WORKFLOW AUTOMATION

PiF technologies

Running your non-profit organization can come with different challenges and tasks than a traditional businesses may face, but you can still utilize many of the same tools and tips by modifying them for your specific needs. Some of an organization’s biggest challenges stem from the hiring, onboarding, and training processes, and employing a smart automation process can help make them simpler.

Many organizations immediately write off the possibility of simplifying their processes because they assume the cost is high. We understand that in non-profit organization’s capital is tight, which is why we offer financing opportunities such as our 5-year lease-to-purchase option. Many of our non-profit customers have been able to use our services on day 1 while still maintaining the cash flow necessary to keep their organization running smoothly.



"One of the best practices in hiring is to be honest about what makes someone a successful employee."

- *The Nonprofit Times*

HIRING AND ONBOARDING

One of the biggest challenges for a Non-profit is finding motivated employees who are just as passionate about your mission as you are. If your current application process is a disjointed, difficult to use online form, or even worse, a physical paper application, you're likely losing qualified candidates before they even set foot in your building.

Consider utilizing a simple, streamlined online form for applications. With a custom solution from PiF Technologies using our web based forms solution and portal, your organization can create applications that are easy to complete on any device. Smart web forms remember data entered, so applicants don't need to fill in the same things over and over on fields such as address, phone number, and other information. They also allow for easy attachments, so receiving resumes, cover letters, and certifications is a breeze.

HIRING AND ONBOARDING (cont.)

Another thing to consider, many applications have unnecessary or redundant questions, take time to consider what you're asking applicants, and why. Are there questions that a resume or cover letter answers, or ones that are irrelevant to the position? Reviewing your application can help ensure you aren't losing the interest of people who might be perfect for the position!

Once an employee is hired, having to spend hours on onboarding paperwork can leave a bad first impression. Smart forms can help eliminate the stacks of paperwork for employees, and hours of manual data entry for an HR or Finance Professional. With smart forms, data is remembered from one form to the next, and employees only have to fill out simple fields or check boxes and the data will be imprinted on the specific form such as an I9, W-2, or benefit election.

"About 62.6 million people, or 24.9% of Americans age 16 and older, volunteered through or for a nonprofit organization at least once between September 2014 and September 2015, averaging 52 hours annually per person."

- National Council of Non- Profits

SERVICE COORDINATION

If serving clients or patients is one of the key tenets of your organization, you've likely had to deal with organizing where they're being served, by who, and when. Your services also likely require service logs, progress notes, incident reports, behavior plans, or plans of correction.

Service Coordination Testimonial: GSIL

Customer Profile: *Granite State Independent Living (GSIL) is a 1000-employee nonprofit organization whose mission is to promote quality of life with independence for people with disabilities and seniors through advocacy, information, education, support and transition services.*

Service Coordination Testimonial (cont.)

Business Situation:

Due to regulatory requirements, GSIL had a new hire packet that was 40+ forms long that would take hours to complete. Information had to be filled in multiple times, time was wasted correcting errors, making copies for filing and finding/auditing the information was tedious. GSIL was getting complaints from consumers, workers and field coordinators and decided to try an electronic forms & workflow solution.

Our Solution:

PiF Technologies assisted GSIL in digitizing the New Hire workflow to use e-forms. PiF was able to automate the process in record time. Rather than print out a stack of paper for a new hire it's all electronic. Key information is filled in once and all forms are automatically populated. Automatic validation ensures that errors and corrections are eliminated. Once internal reviews are completed, the system can automatically print out the paperwork that needs to be hand-signed and notarized. Ultimately, the New Hire e-forms are uploaded to their DocStar document management system.

"PiF Technologies helped us automate the New Hire packet. The rest is history. The efficiency is just incredible. The modern online system is easy to use and meets our business requirements at a reasonable cost."

-Linda Tsantoulis,
Vice President of HR


Searching for records and
manual data entry can cost you
40 HOURS
every month (one week of work!)

RECORDS RETENTION

Records retention is crucial to ensuring your organization is compliant and protected in the case of an audit. The broad definition of records management requires that *every* employee at *every* level be responsible for following retention requirements, but many managers don't fully realize that their records consist of every scrap of paper and electronic documents, from faxes and invoices, to hiring and onboarding documents, to voicemails, emails and database reports.

This leaves organizations that are disjointed with their storage, keeping important records in boxes beneath desks, filing cabinets in unused closets, and flash drives tossed in a drawer. This leads to missing files, incorrect information, or worst case, compliance issues. Or, managers simply believe that using a free online document storage system, email archives, and physical off-site storage facilities are enough, but these systems aren't secure, and the costs can add up.

RECORDS RETENTION (cont.)

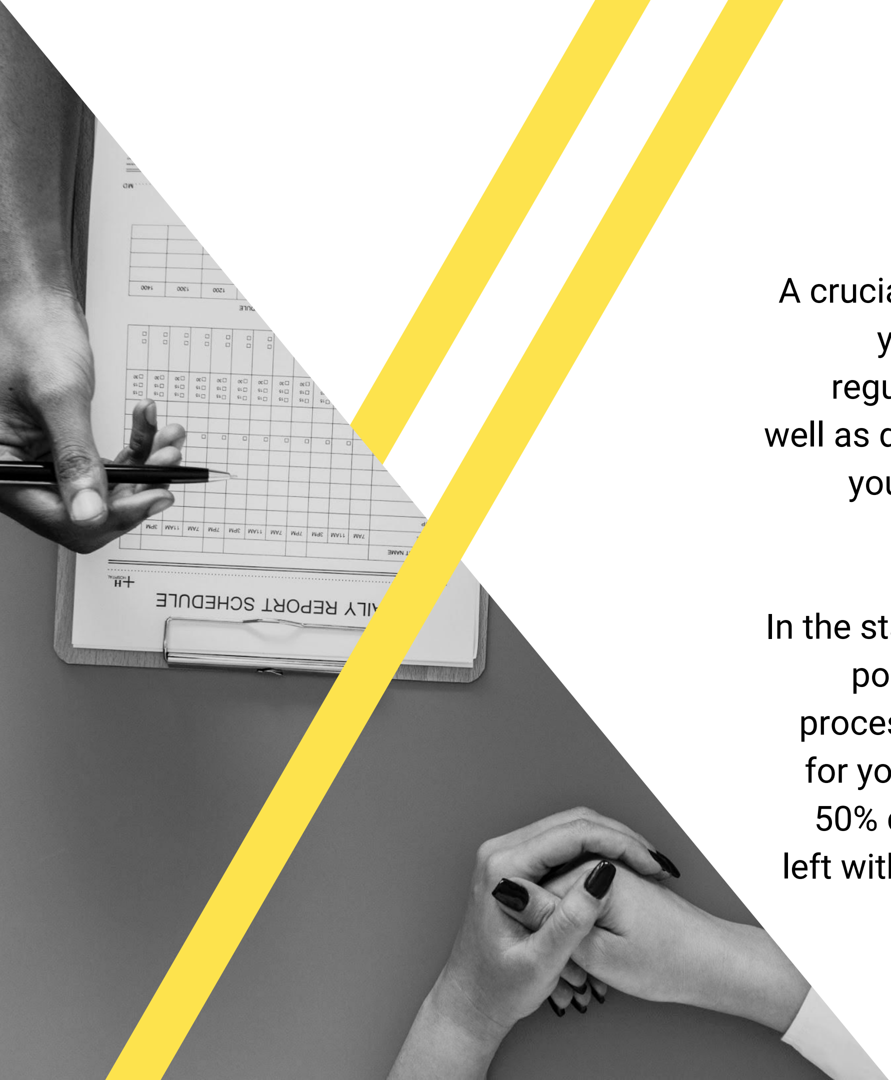
Utilizing an Enterprise Content Management solution can help you stay compliant as well as make your records retention process simpler. Rather than keep all of your files in varying locations across your office, online flash drives, or in offsite storage facilities, you can simply enter documents into collaborative processing workflows that include alerts, approvals, and reporting — eliminating manual data entry! If you're concerned about security, an ECM allows you to restrict certain users from viewing documents, and send them securely (no more vulnerable paperwork sitting on top of desks).

For audit and records purposes, you can enable audit trail functionality by tracking versions and including legally authentic digital signatures and time and date stamps. You will never have to question if a document is compliant, and you can include one-click access to supporting documentation to display related documents. You can access all related documents instantly and pre-define, automate, and enforce your document driven processes.

RECORDS RETENTION (cont.)

To better protect your organization you can include automated due date creation, automated alerts via DocStar and email, require certain documents and approvals, and provide business insight into your document workflows in real-time

The first step to ensuring compliance with state and federal laws is establishing a schedule based on your state’s requirements, then enforcing the proper usage with your employees. If organization has a set records retention schedule, do you stick to it? Consider regularly reviewing your policies with the company, especially those who come in to contact with documents.



BACKGROUND CHECKS

A crucial part of running a non-profit organization is ensuring that your clients can trust the employees they interact with on a regular basis. By performing extensive background checks, as well as drug and DMV record searches, you can feel confident that your new hires will be a good fit for your organization, and be compliant with state and federal regulations.

In the state of New Hampshire, as well as many other states, state police verification is required to certify a new employee. This process can delay your hiring process, as well as become costly for your organization. Couple that with clinician turnover of over 50% due to Medicaid and Medicare reimbursements and you're left with a screening process that slows down daily service levels and increases administrative costs.

BACKGROUND CHECKS (cont.)

PiF has partners that can help provide background screening and verification services for companies and government agencies in search of a screening firm that is compliant and consistent with the Fair Credit Reporting Act, (FCRA). Their solutions are fully automated and web based, so your organization doesn't waste any time or resources completing regular background checks.

A custom connector with your existing web forms solution from PiF allows you to immediately trigger background check orders through an ordering portal, reducing the need to wait or for complex verification.

The chain of custody will be between the source nonprofit and Global HR Research, Inc. HR administrators simply retrieve the background documents directly from the Global HR Research secure portal.

HOW PiF CAN HELP

PiF Technologies has spent over 20 years and has helped over 2,000 clients. We create custom solutions for your non-profit organization to automate your existing workflows and ease your frustration with slow processes.

We have solutions to automate your hiring, service coordination, accounts payable, and background check processes. Our financing options make it possible for non-profits of all sizes to take advantage of the

Think you can benefit from automating your organization?

Give us a call at 888.934.4443 or email marketing@piftech.com