# Streamlining Referral and Financial Processes for Nonprofits with Databridge Solutions

Our client, a mid-sized nonprofit human services organization in the Northeast that operates multiple social services programs, including a food security program and an LTSS Community Partnership program with several Accountable Care Organizations. These programs are designed to assist vulnerable populations both by delivering direct support as well as coordinating bi-directional referrals across a great many partner organizations. Launching these initiatives revealed certain inefficiencies and/or missing capacities in our client's existing data management system, particularly in the areas of managing and processing referrals and remediating financial discrepancies resulting from billing and payment complexities.

The manual nature of these processes not only consumed valuable time but was also susceptible to human error, which could lead to delays, misreporting, and financial discrepancies. Our client needed a robust, automated solution that could eliminate these vulnerabilities and accommodate future growth as their programs continued to expand.

## Challenges

### 1. Manual Data Entry for Referrals

Our client's staff manually entered referral data into their case management software, which was a slow process that was prone to occasional mistakes that could cause delays in connecting individuals with essential services. The large volume of referrals made it increasingly difficult to ensure timely and accurate data entry, especially for cases requiring urgent assistance.

### 2. Establish Linkages to Other Programs

Each of their referrals had to be manually cross-referenced with the State's database to determine connections to other programs. This process, taking 5-10 minutes per referral, consumed valuable staff time and introduced the risk of errors, such as incorrect data entry.

### 3. Financial Reconciliation for ACO Partnerships

In the separate Community Partners program, our client needed to reconcile financial records by manually cross-checking data from their internal software, ACO referral records, and the State's database. This labor-intensive process could take several days and was vulnerable to errors that could result in incorrect payments.



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# Solutions

Databridge Solutions implemented a suite of automated systems designed to streamline the food insecurity referral intake processes, as well as the ACO financial reconciliation process. These systems eliminated the time-consuming, error-prone manual work that our client had previously relied on, providing a faster and more reliable solution, while allowing for additional growth.

## 1. Automated Referral Entry

Databridge Solutions automated the referral intake process, integrating directly with our client's CMS system to automatically capture and input referral data from partner organizations. This eliminates the need for manual data entry, reducing the potential for human error and speeding up service delivery.

## 2. Automated Eligibility Verification

Databridge Solutions integrated our client's CMS with the State's database, enabling real-time checks for incoming referrals. This automation removes the need for manual lookups, eliminating delays and reducing the risk of errors. What previously took 5-10 minutes per referral was now handled automatically in seconds.

## 3. Automated Financial Reconciliation for ACOs

Databridge Solutions automated the cross-verification of data between our client's CMS, ACO referral records, and the State's database. This streamlines the reconciliation process, ensuring accurate and timely billing, and drastically reduces the risk of human error that previously led to over- or under-payments. What once took several days of manual work was now completed within 24 hours, allowing our client to quickly identify and resolve discrepancies.

# Results

## Reduced Time and Errors in Processing

Before Databridge: Manual data entry and eligibility checks were slow and prone to human error, with eligibility checks taking 5-10 minutes per referral. Staff often faced delays in processing referrals, and the manual steps opened the door to potential mistakes in data handling.

After Databridge: Automated data entry and eligibility verification improved referral processing, eliminating the risk of human error and connecting individuals with services faster. With the automation in place, eligibility checks are completed in seconds, ensuring prompt and accurate service delivery.

## Increased Staff Efficiency and Accuracy

Before Databridge: Our client's staff spent significant time manually entering data and verifying referrals, tasks vulnerable to errors such as mistyped information or overlooked eligibility requirements. These errors could delay service delivery or result in individuals being enrolled in services for which they were not qualified.

After Databridge: The automated system reduces the administrative workload, allowing staff to focus on client care and program growth, while ensuring data is entered and verified correctly, minimizing the risk of mistakes.

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# Results Continued

## Scalability for Growth

Databridge Solutions provided our client with a scalable system that will grow alongside their evolving programs. As the volume of referrals increases, the automated processes will handle the additional load without the need for extra administrative resources or concerns about errors from overwhelmed staff.

## Improved Accuracy and Speed in ACO Financial Reconciliation

Before Databridge: Manual reconciliation of financial records across multiple data sources took days to complete and was highly susceptible to mistakes, which could result in over- or under-payments, creating financial strain and complicating our client's relationships with their ACO partners.

After Databridge: The automated system completes reconciliations within 24 hours, cross-verifying data with precision and ensuring accurate billing. This not only saves time but also reduces the risk of financial errors, improving transparency and fostering stronger relationships with ACO partners.

# Conclusion

Databridge Solutions revolutionized the way our client manages their referral and financial reconciliation processes by eliminating the time-consuming and error-prone manual steps that had previously caused delays and inaccuracies. By automating these critical workflows, Databridge enables our client to deliver services more efficiently, with greater accuracy, and at a scale that accommodates the growing needs of their programs.

The automation provided by Databridge Solutions not only improves operational efficiency but also ensures the integrity of our client's financial processes, preventing costly errors and freeing staff to focus on their core mission—providing essential food and housing services to those in need.

This case study demonstrates how Databridge Solutions' automation and integration expertise can help nonprofits streamline their operations, reduce human error, position themselves for sustainable growth, and more importantly, focus on helping the people they serve.

# Who We Are

Databridge Solutions, founded by the Watkins Brothers, is dedicated to empowering nonprofit social service organizations and for-profit companies through advanced IT solutions and data analysis. Recognizing the unique challenges faced by these organizations, we offer customized services including data integration, automated process management, and grant compliance and data reporting. Our mission is to enhance operational efficiency, allowing nonprofits to focus on their core missions and maximize their impact, and companies to grow. By bridging the gap between limited resources and the need for sophisticated technology, we help our clients achieve their goals effectively.

Our solutions work alongside your current software solutions, providing comprehensive functionality without complicated integrations. We can work with any existing system and across different platforms to get you the results you need.

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