REVVER

Case study: Case Management

KVC Health Systems: setting the standard for compliant collaboration



KVC Health Systems

Executive summary

KVC Health Systems is a national leader in mental health and child welfare across a 60+ strong network of local non-profits in locations across the U.S.

The organization is setting the standard for a more efficient and compliant way to collaborate across the document information lifecycle to create seamless case management experiences.

Through Revver's Intelligent Document Automation (IDA) solution, KVC has reclaimed precious time for 2,400 professionals so they can focus on helping and improving the lives of 75,000 children and families every year.

Value delivered:

Automated entire adoption process

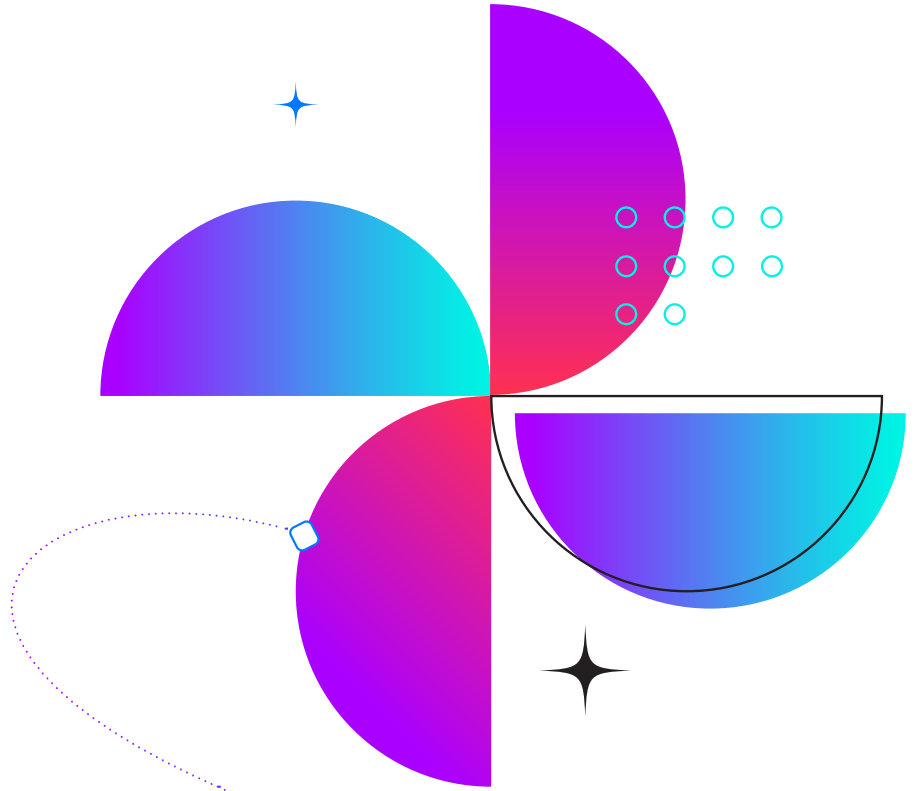
10 hours

a week saved per employee

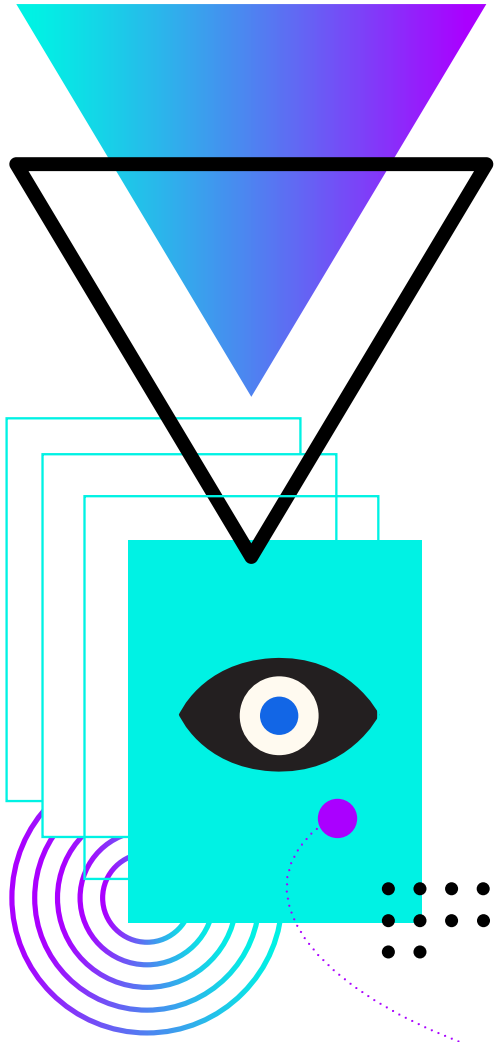
100+

folders instantly created vs. 24 hours via previous DMS solution

High adoption and user engagement



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Introduction

KVC's challenge is a familiar one. As a leader in behavioral health, a large proportion of its operations is driven by documents (i.e. medical records, school records, case plans, court documents, invoices and more).

Like most heavily-regulated organizations, any document management system or digitization efforts must adhere to stringent requirements such as HIPAA and state contract guidelines.

KVC faced a battle on two fronts:



Find a compliant solution to digitize their processes to drive efficiencies, improve ecosystem collaboration, and protect limited resources



Find a solution that people would actually use to avoid invisible workarounds.

"Regulatory folks and auditors are constantly keeping an eye on the viability of electronic record systems."

Brett Easley, VP of Enterprise Systems Management and the Project Management, KVC

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Challenge

An antiquated manual approach to documentation.

Before discovering Intelligent Document Automation, it took extensive manual work to store, process, and protect high volumes of case files for adoption.

"One case file for a child may consist of a number of 3-inch green binders called "green books" filled with medical records," explains Brett Easley, VP of Enterprise Systems Management and the Project Management for KVC.

"A typical case entailed a lot of mailing copies to families. And all physical records were locked away in a file cabinet, in a locked office, down a locked hallway. Accessing files every day took a lot of time and effort."

Digital storage wasn't any easier. Documents were scanned, saved to an alternative location, and then uploaded to their internal system. This was a time-intensive process that entailed manually creating 100+ folders per case.

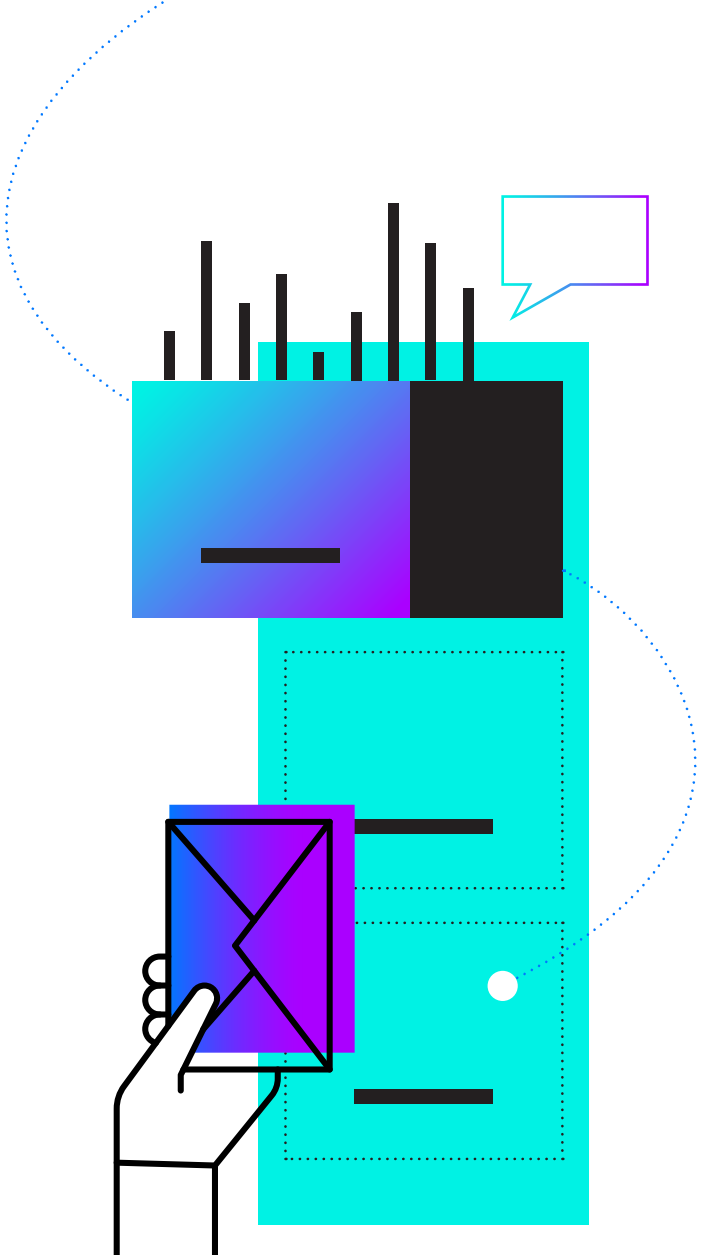
As a non-profit, this antiquated and cumbersome approach drained limited resources.

"We can't afford to be spending any time fiddling with technology. That's time away from providing quality care."

It was also, crucially, a threat to data protection and integrity.

"Even with internal systems, such as Sharepoint and OneDrive, for individual file storage and organizational file sharing, we lacked the oversight into who files were being shared with," continues Brett.

"We had the same problem with email - even if a document was password protected, emails can easily go awry."



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A digital solution nobody used

This led the organization into an unsuccessful foray into a case management system (CMS).

"Instead of removing friction and making us more secure, it actually added more friction and made us less secure," recalls Brett. "Search was slow, it was finickity to use, and extracting documents for email was intimidating and took forever."

The system was so convoluted and complex, meaning

"Case managers would avoid using it and find workarounds so they could get on with their job. It created a gap in the security fence."

With myriad channels and ways of handling and collaborating on information, Brett and his team knew they had to simplify things in a way that appeased everyone - especially with regulatory bodies cracking down on electronic system compliance.

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Solution

A night and day difference.

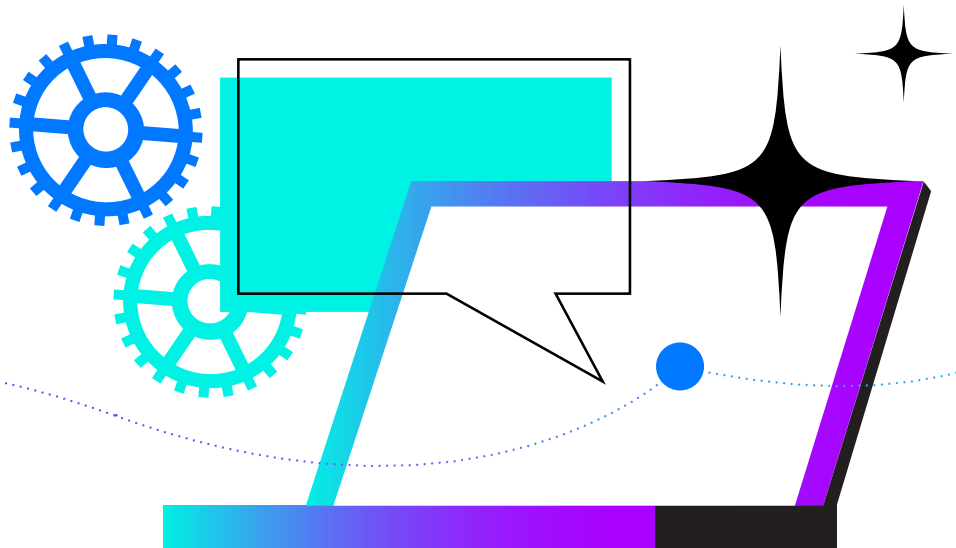
The search led them to the Revver Intelligent Document Automation platform, which met their most pressing requirements, including:

- **Intuitive and secure solution for storing, retrieving and sharing files**
- **Secure portal for external users to upload and access files**
- **Designed for collaboration and workflow efficiency**
- **Easy to navigate for all users**
- **Easy integration with Microsoft Office and email systems**
- **Provided a familiar file structure to Microsoft suite**
- **Fast search and file retrieval**

"Revver's solution made a night and day difference in just weeks," beams Brett. "It's as easy as one secure click to provide access to an encrypted portal. Families can just login in, complete a form, and the case manager is automatically notified."

"We can instantly automate folder creation (which can be 100+ per case). It used to take 24 hours with our old DMS solution."

"We also now have full visibility into the document information lifecycle, can see where everything is and who has eyes on what. We can lock sensitive files, or even certain parts of the file, right down to a specific document. Everything flows like a river."



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Benefits

Focus on the stuff that matters

Nobody wants to spend time doing work about work, searching for files, waiting for doors to be unlocked, checking and double checking whether their processes are compliant or not - especially when their primary duty of care is people in need.

"Revver allows us to put time back in our professionals' hands so they can focus on why they go into this field which is helping children and families."

"We reckon we've given everyone, on average, 10 hours back a week."

High adoption *(and no more invisible workarounds)*

Unlike their experience with the old CMS solution, where people circumvented the tool completely, KVC has found that the workforce wants to use Revver.

"People are now willing to go in and navigate the system because they know they can easily find what they need and pull files from the system - reducing invisible workarounds."

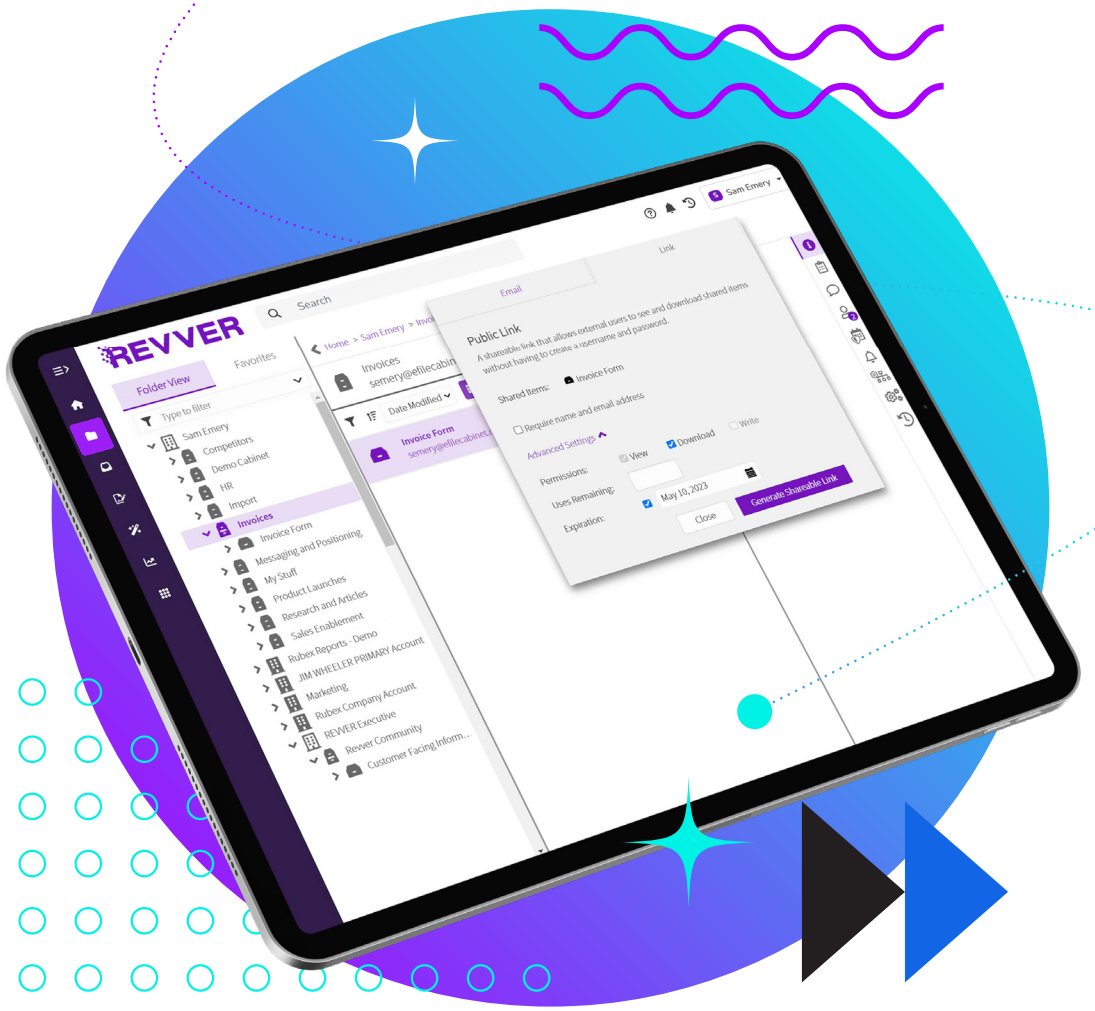
"It's not seen as an inconvenience, rather something that genuinely improves how they work. Now everyone marks up changes in one place, fostering faster collaboration across our business and ecosystem."

Four steps ahead

No longer playing catch up, nor lacking the controls regulators expect, KVC is showing the industry and its partners what the future looks like.

With the adoption process optimized, the healthcare provider is now looking to phase in the invoicing processes, among others, as it seeks to bring the whole company into a single system

"We're showing all the different entities a viable advanced system that makes everyone's lives easier," concludes Brett. "We're already four steps ahead of what regulators want. We hope we're leading the way to a better, safer way of working that always puts care first."



Revver is an Intelligent Document Automation solution that delivers seamless collaboration experiences.

The no-code cloud platform comes with an integrated suite of tools that continuously manages the whole document information lifecycle from multi-format ingestion, data extraction, processing and insights, to automated archival or destruction.

The Revver Document Automation services provide extensive orchestration, adoption and optimization support, providing document and workflow mapping, automation design, document information lifecycle architecture, data visualization and insights reporting, and maturity roadmap.



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