

CASE STUDY: **LIFEWORKS**

LIFEWORKS GAINS GREATER EFFICIENCY & COMPLIANCE BY BRINGING TIME & EXPENSE TOGETHER WITH DATABASICS





THE SITUATION

Nonprofits are complex organizations. And when it comes to time tracking and expense reimbursement for employees, **Lifeworks** had more than its share of complexity.

A Minnesota nonprofit employing 4,342 individuals, **Lifeworks** is a recognized leader in serving people with disabilities. **Lifeworks'** employees fall into several categories, each with varying requirements for time and expense tracking. The organization relied on manual processes and homegrown applications to meet its complex needs when it came to capturing client, labor and expense details.

Lifeworks

HIGHLIGHTS

4,342
Employees

8
Locations in the
Minnesota Area

CHALLENGES

Manual Processes

Homegrown Applications

Complex Challenges
Capturing Labor, Client
& Expense Details



STRUGGLING WITH DISPARATE LEGACY SYSTEMS

The lack of integration between timekeeping and expenses, along with the complexities of serving diverse user groups, resulted in cumbersome, complex systems with no modern features such as mobile capabilities. Lifeworks determined that its IT staff's time could be better served not attempting to build or adapt its homegrown solutions. Don Becchetti, Director of IT at Lifeworks, says, "Instead of redeveloping or modernizing our current systems, we were looking to move away from applications developed in-house to a more flexible, standardized cloud-hosted model."

In the process, Lifeworks also wanted to simplify back-end systems management with a fully managed software-as-a-service (SaaS) solution. By not having to do software updates, configurations, changes, improvements, and coding, Lifeworks wanted to focus its IT department on work that delivers more value to those whom they serve.

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DON BECCHETTI | DIRECTOR OF IT AT LIFEWORKS



COMPLIANCE COMPLEXITIES

A key requirement for Lifeworks is compliance with several federal and state laws, including HIPAA, state privacy laws, and Electronic Visit Verification (EVV), a new regulation that requires service providers to electronically track in-home visits. EVV requires in-home caregivers to capture details like the location and time of a visit using a mobile device with GPS functionality to verify location.

In essence, Becchetti says, "We wanted a good looking front-end and a monster back-end to support it."

Lifeworks was also seeking a technology partner that could deliver stellar support through implementation and throughout the solution's life cycle, something that Becchetti says is hard to find. "Lifeworks was looking for an innovative partner that can work alongside its internal teams to find creative and dynamic solutions for its challenges," he says.

After a deep evaluation of several SaaS solutions, Lifeworks landed on **DATABASICS**, which combines built-in comprehensive functionality with the flexibility to customize.

TO MODERNIZE ITS TIME AND EXPENSE SYSTEMS, LIFEWORKS WAS LOOKING FOR:

A comprehensive, out-of-the-box solution that integrates timekeeping with expense data

The ability to customize the solution to fit with its services

A configurable back-end that doesn't require custom development

Mobile apps and GPS functionality to meet EVV requirements

Simplicity for the user

PCI compliance for credit card transactions



WORKING WITH THE A-TEAM

The implementation process took about 18 months, starting with the CORE Employee implementation. Linda Zepeda, Project Manager at Lifeworks, says, "We had a great experience working with **DATABASICS** for the implementation. We called our work group 'the A-Team.' We had a really great connection with each other and worked extremely well together." She says **DATABASICS** delivered reliable and attentive support throughout the implementation journey to help them get the level of customization they required.

COMBINING TIME AND EXPENSES FOR SIMPLICITY AND EFFICIENCY

By utilizing **DATABASICS** to combine time tracking and expense reimbursement, Lifeworks has replaced its manual systems and greatly simplified processing. Becchetti says, "It's been a big improvement for our staff, because in the minds of our employees, time and expense functions are tied together. **DATABASICS** integrates both functions with a process that's intuitive, easy to use, and much easier for us to support. All system complexity is now behind the scenes. We've never had anything quite so integrated or comprehensive."

With time and expense data in one place, Zepeda says it's now much easier to pull reports. And compliance is no longer a concern. **DATABASICS** helps Lifeworks comply with HIPAA, Minnesota privacy legislation, and EVV. PCI compliance for credit card transactions is also handled behind the scenes by **DATABASICS**.

INNOVATING WITH ROCKSTARS

Looking ahead, Lifeworks will continue to partner with **DATABASICS** to tie its time and expense data into its data warehouse, which will support better decision-making and help the organization improve its services and efficiency. **DATABASICS** is also engaged in ongoing work with Lifeworks to improve its dashboards and reporting capabilities.

Zepeda says, "I would highly recommend **DATABASICS**. It's an out-of-the-box system that we don't have to support on premises anymore. But it also gives the option for customization so we can tweak it to work with our internal procedures and systems."

But in the end, the secret sauce is in the relationship. Zepeda says, "The great support from **DATABASICS** was key to our success. They're rockstars."

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success. They're rockstars. ”

LINDA ZEPEDA | PROJECT MANAGER AT LIFEWORKS





Lifeworks

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ABOUT LIFEWORKS

Since 1965, Lifeworks Services Inc. has been a champion for inclusion. Lifeworks was founded by families who recognized the importance of advocacy and breaking down barriers for people with disabilities to be part of the community.

As an industry leader, Lifeworks continues our commitment to self-determined support, careers with competitive wages, and developing innovative opportunities that enhance everyday lives.

[LIFEWORKS.ORG](https://lifeworks.org)

ABOUT DATABASICS

DATABASICS is driven to meet the most demanding time and expense management challenges for organizations throughout the world with a combination of deep expertise, next-gen technology, and a focus on the unique needs of each customer. Powered by decades of experience, DATABASICS is in the business of solving time and expense problems with solutions that are the right choice for today and easily adapt to the uncertainties of tomorrow. Time and expense are better together, which is why DATABASICS addresses these two critical business processes with absolute ease in one solution.

[DATA-BASICS.COM](https://data-basics.com)