



Care Initiatives

CUSTOMER SUCCESS STORY

CUSTOMER

Care Initiatives

PRODUCTS & SERVICES

Evisort Platform

INDUSTRY

Healthcare

COMPANY SIZE

2,800 employees

LOCATION

Iowa, USA

WEBSITE

www.careinitiatives.org



Care Initiatives is the largest non-profit skilled nursing and long-term care provider in Iowa, with 43 nursing homes and eight hospice offices located throughout the state.

When the organization first established an in-house legal team in late 2020, the new in-house lawyer saw an opportunity to move from disjointed contracting operations and manual processes (often involving physical contracts, which posed significant challenges amidst changing public health mandates) to a more centralized approach with consistent approval processes across locations and vendors.

MAKING THE SHIFT TO ARTIFICIAL INTELLIGENCE

The legal team turned to Evisort and its contract-focused artificial intelligence (AI) for their contract and vendor management. Initially, only about a quarter of Care Initiatives' entire portfolio of contracts were digital. They set an initial goal to digitize the full portfolio within two months.

With Evisort, Care Initiatives beat their goal by more than 75%: in just two weeks, Care Initiatives' lean legal team was able to work with all 43 office administrators to get every contract securely accessible in one central location, with dozens of clause types and key pieces of metadata easily searchable.



At Care Initiatives, we've been able to digitize over 33 years' worth of legacy contracts with Evisort. Evisort's OCR was critical in this project and we centralized 100% of our contracts within 10 days.

MANAGER OF LEGAL OPERATIONS, CARE INITIATIVES

By centralizing their contracts in Evisort, the Care Initiatives legal team got a clear view of the organization's obligations and rights across thousands of geographically scattered contracts, helping them quickly get up to speed with what was happening in all 43 locations. They knew that Evisort's AI provided speed and cost-efficiency that wouldn't have been feasible with manual processes. On top of that, they knew that many contract management tools would have required them to manually input information for each contract into the system, one by one, preventing them from moving as quickly as they wanted to.

With a single source of truth for the organization's contracts, the Care Initiatives team could immediately start making strategic decisions.

STREAMLINING VENDOR MANAGEMENT AND COMPLIANCE

One key focus was vendor management, which had previously been difficult to manage across the 43 different care centers. By creating standardized workflows in Evisort, the Care Initiatives legal team was able to offer self-serve processes for each location to quickly produce contracts for simple agreements to get necessary supplies in their buildings. The Manager of Legal Operations reported,

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Evisort's workflow tool allows Care Initiatives to grow our business faster while staying compliant by automating the way we draft and approve contracts. Evisort allows legal, operations, IT, finance, executive hospice leadership, and 150 care staff to collaborate on the same ticket, ensuring that every contract is signed on the right template and with the proper approvals.

MANAGER OF LEGAL OPERATIONS, CARE INITIATIVES

With all of their contracts in Evisort, the legal team easily identified critical areas for review and consolidated agreements for services across separate offices.

As a healthcare company, Care Initiatives regularly fields unannounced visits from auditors to assess compliance. During these visits, the team must show that they have agreements in place for many different types of outsourced services — from snow removal to janitorial services and more.

GETTING AHEAD OF AUDITS WITH CONTRACT INTELLIGENCE

Any good healthcare provider knows that an ounce of prevention is worth a pound of cure. With Evisort's contract AI, one person efficiently manages the entire Care Initiatives contract portfolio in the cloud — work that previously required dozens of employees all over the state. Now, the team can prepare for auditor visits in advance by identifying how many offices are compliant, determining the status of the remaining offices, and coming up with a plan to rectify any outstanding compliance issues before the auditors arrive.

With all Care Initiatives' contracts in Evisort's cloud-based platform, the legal team can easily find the required agreements to satisfy these audits. If auditors do identify any issues that need resolution, the team needs to update their documents and provide proof in order to avoid penalties such as fines. Before, manual remediation processes took at least a full business week. Now, Evisort's workflow and integrated e-signatures help the team turn those revisions around in a fraction of an hour. "As a healthcare provider, every minute matters for Care Initiatives as we strive to deliver exceptional experiences," pointed out the Manager of Legal Operations, Care Initiatives.

ACCELERATING CONTRACT APPROVAL WORKFLOW

Another area where Care Initiatives transformed their legal operations with Evisort's AI was on the fast-growing hospice side of the business, which provides external care for patients and residents in outside facilities.

24 community representatives across the organization's eight hospice offices used to handle their own contracts independently. Now, that process goes efficiently through one employee with standardized workflows in Evisort. In the past, it sometimes took two months to get a new agreement finalized with an external facility. Today, the team can turn a new contract around in just a few hours.

They can also quickly search for agreements with particular business partners and locate specific terms such as exit clauses or termination for convenience. Making contracts searchable in a digital database makes it easier for Care Initiatives to switch vendors in order to optimize the care their patients receive. The team reported that

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Evisort has been essential to empowering our legal operations and procurement at Care Initiatives.

MANAGER OF LEGAL OPERATIONS, CARE INITIATIVES

Thanks to their newfound efficiency, the hospice business is able to serve an all-time high number of patients today as Care Initiatives continues to grow.

Want to learn how Evisort can help your business transform legal operations?

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