

## Case Study

# How Lone Star Family Health Center Uses ComplyTrack's IAM/IM and Contracts & Vendors System to Manage Workflow, Streamline Reporting and Maintain Compliance

*Lone Star Family Health Center is a Federally Qualified Health Center (FQHC) and state-of-the-art family medicine provider operating facilities in Conroe, Spring, Willis, and Grangerland, Texas. Lone Star Family Health Center (LFHC) provides individuals and families, infants to seniors, with a full range of healthcare services, including women's, men's, dental, pharmacy, laboratory and X-ray, sports, pediatric, mental health, OB/GYN, geriatric, and more.*

This case study is based on an interview with Jennifer Carpenter, CCEP, Director of Compliance at Lone Star Family Health Center.

### Shifting From Manual To Automated Information-Management Delivered Many Benefits

One of the aspects that makes Ms. Carpenter's position at LFHC somewhat unique is the wide range of responsibilities that fall under her purview. As she explains, *"I'm a department of one. That's how it is at many nonprofits, because we do operate on such a limited budget. So, many responsibilities fall under compliance in a way that's a little different from other health centers. This includes federal grant management, regulatory compliance, risk management, insurance, provider credentialing, medical records, program eligibility, and more. These all fall under the compliance department's oversight."* Clearly that's a lot for one person to manage, which makes recordkeeping and reporting even more of a challenge.

### EXECUTIVE SUMMARY

#### Director of Compliance

Jennifer Carpenter, CCEP,  
Lone Star Family Health Center

#### Challenge

As a Director of Compliance at a FQHC, Ms. Carpenter has responsibilities that span many areas. She needed a single, centralized system that would help her consolidate and track key information for risk-assessment, incident management, contract review, and reporting purposes.

#### Solution

ComplyTrack's Issue Action Management, Incident Management and Contracts & Vendors workflow system quickly enabled Lone Star Family Health Center to streamline processes, increase efficiency and maintain compliance across the many areas in which it operates.

Ms. Carpenter's predecessor, who held the position for approximately eight years, had established manual systems, maintained on Excel spreadsheets. *"When I did a risk assessment, I realized that gaps could potentially develop. This was in part because everything was being done manually. They didn't have the resources to get new systems, and it was just easier to keep up with the work by doing things through Excel, in Word and hard copy files. I report to the CEO, and I suggested that, instead of getting another full-time person, we should first invest in systems that will support compliance and also assist with contract review. A high priority was to put a system in place to track contracts, so we weren't paying for unused services on a contract that could have ended within that 60- to 90-day notice window. In addition, we can be more aware of, and transparent with the board about, the types of feedback we get from our patients and the trends we are tracking. Now we see a bigger picture that we couldn't through an Excel spreadsheet."*

### Two Key Functions On One Platform At An Affordable Price

Ms. Carpenter had two clear goals in mind when she set out to look for the new system. *"I really wanted a contract management system and also a compliance database. I knew I was looking for two different systems, but with my budget, I thought I would only be able to purchase one. Of course, I focused on what I thought was the most important, which was compliance tracking, and that's how I learned about ComplyTrack. I was pleasantly surprised when the ComplyTrack people told me they also have the Contracts & Vendors workflow system, and that I would be able to fit both within my budget."*

### Issue Action Management And Incident Management Delivered Significant Time Savings Immediately

In discussing the benefits of IAM/IM, Ms. Carpenter turns first to the substantial savings in time that she has realized as a result of implementing these systems. As she states, *"Before we implemented IAM and IM, we had to take Excel spreadsheets to the peer review committee, and it would take two to three hours to discuss, because it was so difficult to understand what the patterns were. Now, I'm able to run a report, trend it and present it. So, for our internal meetings we're able to get this done in 45 minutes compared to three hours."* But reporting is only a part of the time-saving benefit. *"A big part of what I do is work on patient satisfaction and patient complaints. That's the day-to-day stuff. When I get a patient complaint, we log it right away. Once it gets into the system, and I inevitably must move onto something else, sometimes fairly quickly, if the patient calls, or if there's an update, I'm able to go into the system right away and pull up the status with the last action taken, instead of digging through files. It just makes the workflow so much smoother, and it saves me time to focus on other things."*

### Appreciated At The Highest Levels

Ms. Carpenter reports that these efficiencies have been noticed at the top of the organization. *"My CEO clearly sees the impact. ComplyTrack has enabled us to save over \$30,000 on overhead. The board appreciates it because they feel that it's fully transparent. There was always transparency, but we just didn't have the tools to deliver reporting and trending the way we can now. We've caught expiration dates with the Contracts & Vendors program that we would not have caught without it. We're able to accurately trend for risk management purposes, and it helps a lot with risk assessment and systematizing our processes. It has had a major impact on our organization, and we're only getting started with what it can do for us."*