

Innovation Leads to Automation of Mission Critical Processes for Every Body Texas

Every Body Texas is a nonprofit organization dedicated to ensuring every person in Texas can access safe, unbiased, high-quality sexual and reproductive healthcare regardless of their circumstances. As the statewide Texas Title X grantee, Every Body Texas distributes millions of dollars per year to a network of 35 healthcare agencies operating more than 170 clinics across the state. This funding is critical to keeping clinics open and delivering much-needed care to more than 150,000 Texans every year. Every Body Texas supports clinics, health departments, freestanding family planning clinics, university and hospital systems, Sexually Transmitted Infection (STI) clinics, and community based agencies as well.

In 2020, Matthew Thompson, Director of Financial Contract Compliance, as well as the Acting Title X Director and Co-CEO, recognized the need to streamline processes and improve operations through automation using SharePoint Online and Power Platform. Being a transformational leader in the organization, when faced with maintaining and creating hundreds of Excel spreadsheets annually to manage the agency network’s financial allocation process, he re-envisioned the process and made a compelling business case to their board, seeking out a partner to design and deliver a solution called the Agency Portal.

This case study is focused on how Compass365 worked with Every Body Texas to improve the efficiency of manual and tedious yet critical tasks for Every Body Texas’s network of providers and internal operations.

THE CHALLENGE

Every Body Texas leveraged an epic number of spreadsheets to manage financial allocations and reporting for funding to the agency network. These spreadsheets need to be recreated annually as funding allocations and reporting is done yearly. The process was cumbersome and repetitive – there had to be a better way.

Matt needed a Microsoft Partner he could trust. He found Compass365, a division of General Networks, online, and noted their positive references/testimonials. As a non-profit with limited resources, Every Body Texas prioritized engagement with a reputable partner that was highly experienced, innovative, and trustworthy.

SUCCESS METRICS

- Critical business tasks automated for speed and accuracy
- Internal staff and external subrecipients time saved
- User-friendly solution available to licensed and non-licensed users
- Leverage existing Microsoft 365 tools

INDUSTRY

Non-profit, Sexual and Reproductive Healthcare

PLATFORMS AND SOLUTIONS

- Microsoft Power Apps
- Microsoft Power Automate
- Dataverse
- Microsoft SharePoint Online
- Microsoft Office 365

“Compass365 is the only vendor we have worked with that our entire team has felt completely supported by. They are always responsive to our needs, and their support has helped us expand our business.”

Matthew Thompson, Director of Financial Contract Compliance, Acting Title X Director, and Co-CEO, Every Body Texas

ABOUT COMPASS365

Compass365, a Microsoft Gold Partner, combines our years of SharePoint and Microsoft 365 expertise with proven methods to improve the way companies work, operate, and confidently get the value from their Microsoft investments.

The solution needed to be user friendly, innovative, and built for varying degrees of technology experience. Matt visualized the solution and explained his vision of automation, keeping the Every Body Texas network of subrecipients and service sites in mind which are often understaffed. From the first meeting, Matt saw Compass365 as the vendor who would deliver a great solution.

THE INVESTIGATION

The Compass365 team started the discovery process with Matt sharing his vision and running through the day to day of "I send you a spreadsheet, you save it, you send it back to me." But they also needed triggers and signature and collection points, which was the starting point to building the agency portal and Power Apps.

Requirements discovered:

- Means to regulate and operationalize the process of communications with their subrecipients
- Internal Administrator App
- External User App

THE SOLUTION

Compass365 and Every Body Texas leveraged Dataverse to store all subrecipient data, and Power Automate flows were connected for task management, notifications, calculations, and integration with Salesforce for client data.

Compass365 and Every Body Texas decided together to create two Power Apps: one internal for the Every Body Texas team and an external one for all of the subrecipients. The internal Power App was created to receive, process, and manage fiscal year financials. It also pushes out decisions, grant amounts, and notifications of compliance reporting. With each new fiscal year, there is a need to create a new record for an agency, assign a dollar amount, record the info sent to the agency, and track any negotiations. Once accepted, the system creates a contract for signature and approval. The Power App categorizes the award amount into expenditure categories and notifies internal users of monthly payments and where items need to be reconciled.

The external Power App used by subrecipients can be accessed through any email account (Microsoft or not). Every Body Texas stores all its agency contacts in Salesforce and then downloads and invites appropriate contacts to register. Subrecipients can log in using their identity with notifications based on their role in Salesforce (i.e., financial reports go to financial contacts). With this role-based external log-in, they can access the external facing Power App – secured for access by non-Every Body Texas users. Being able to create and secure a Power App for external users has been a huge win for an organization whose main "customers" for receiving and managing funding are external.

COLLABORATION AND MODERNIZATION

Compass365 helped Every Body Texas deliver to internal stakeholders and staff and external clients/subrecipients a new, modern "one stop shop" Agency Portal, leveraging Power Apps, Power Automate, and Dataverse. The solution also gave everyone involved a better, easier, and faster way to tackle the multitude of important documents, approvals, and signatures required as due diligence when dispersing and tracking Federal funding from source to recipient.

After successfully delivering the Agency Portal to the subrecipient network with good feedback, Every Body Texas is beginning phase 2 enhancements, tackling continued financial and program compliance by continuing to automate reporting and additional process improvements.

"The design of this solution with Compass365 is so user-friendly for our network and team. I gave them my vision, our branding guidelines, and what we believe in - they got to work and reflected everything in the solution they built for us. We love it."

Matthew Thompson, Director of Financial Contract Compliance, Acting Title X Director, and Co-CEO, Every Body Texas