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FileBound

Case Study

Yonkers Community Action Program automates AP processes, reducing work during audits.



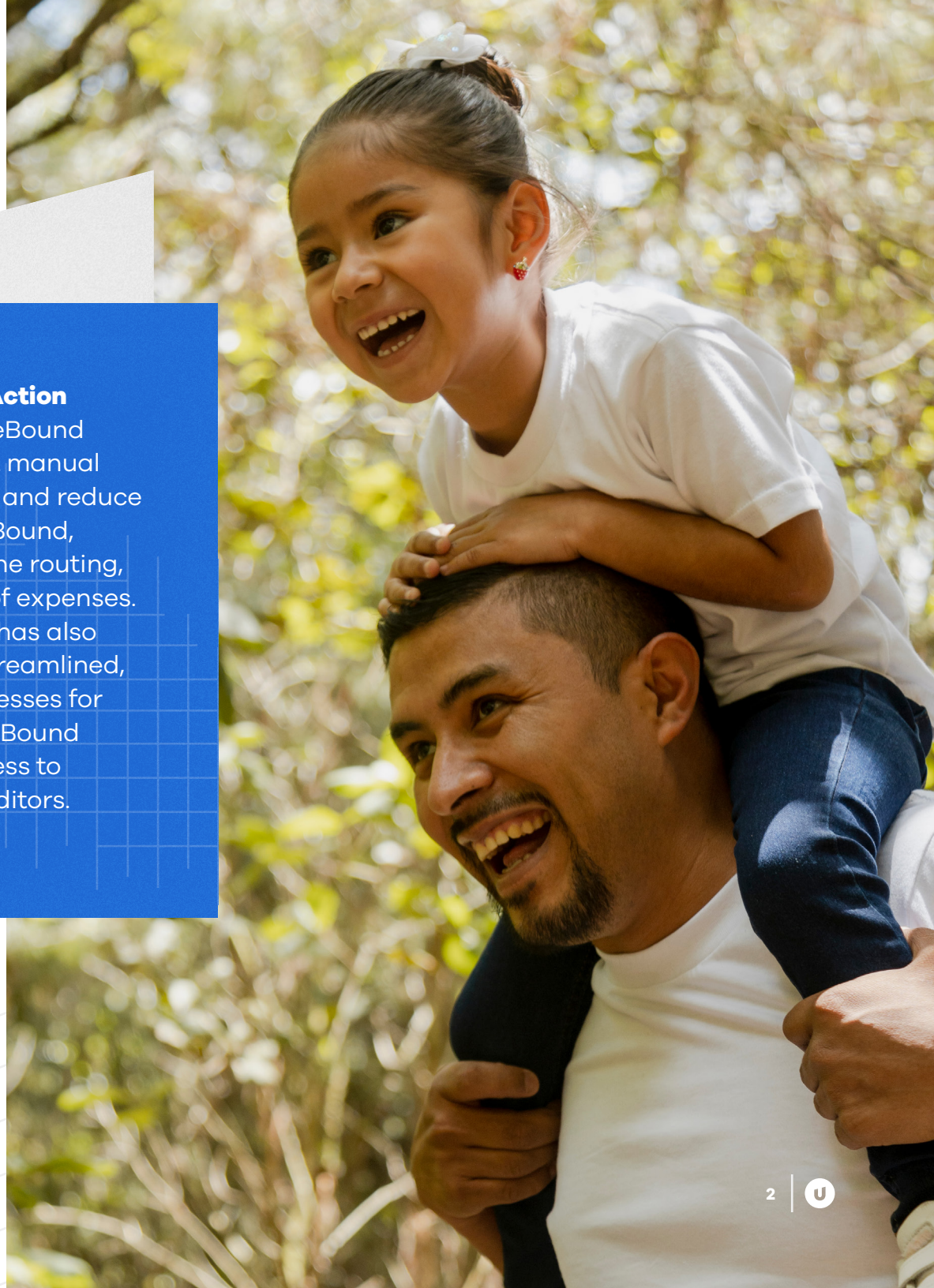
INDUSTRY
Nonprofit

COMPANY
**Yonkers Community
Action Program**
Yonkers, New York
yonkerscap.org

This nonprofit has worked with residents and partners since 1965 to provide resources and services that improve health, education of low-income individuals, families, and promote community empowerment.



Yonkers Community Action Program turned to FileBound to eliminate inefficient manual accounting processes and reduce paperwork. Using FileBound, staff has automated the routing, review, and approval of expenses. The accounting team has also seen the benefits of streamlined, less complicated processes for periodic audits, as FileBound allows temporary access to documentation for auditors.



How can a small team process expenses more efficiently from anywhere?

Manual processes were cumbersome.

This nonprofit's lean accounting team was feeling the burn when it came to manual expense processing. Packets were physically delivered to the Board Treasurer for review, approval, and then delivered back to the office for processing, which meant time lost due to travel. By August 2020, the demands of a remote work environment due to the pandemic and other COVID restrictions made it even more clear that the current system wasn't working to run an efficient operation.

Electronic document processing was the solution.

FileBound integrated with the nonprofit's existing accounting system, FundEZ, to replace manual processes with automated routing and approvals, while also creating robust document recovery capabilities and strengthening business continuity.

Now everything is securely stored in the FileBound cloud and is easily accessible to permissioned users.

Today, Board Treasurer Nadia Matthie can easily access, review, and approve documents from anywhere, which means processing of documentation and delivery of urgent funds happens faster than ever. "The process now is so much more fluid: I get an email, I review, and then I approve it—and it's been great."

"It's so very important to have records stored somewhere that is secure and accessible by all. Relying on paper processes always makes me wary, because if there's a fire or flood, that paper is gone. With FileBound, we have everything in the cloud and can refer to it, which is crucial from a document retention perspective."

– Nadia Matthie

Board Treasurer, Yonkers Community Action Program



This team conquered time-consuming audit processes using automation.

Mastering the art of the stress-free compliance audit.

Putting a reliable automated document management system into place yielded benefits beyond just making accounts payable processes faster and easier to manage. Yonkers Community Action Program also minimized staff time and effort in helping auditors to complete their tasks.

As a not-for-profit, Yonkers Community Action Program potentially performs two or three audits per funder per year in addition to an annual audit requirement by an external audit firm. In short, the nonprofit is almost constantly under audit, which meant added pressure for staff and time diverted away from client resources

because staff needed to focus attention on helping auditors locate needed documentation.

With FileBound, this is no longer the case. The accounting team created a separate sign on for auditors, so they are able to go into FileBound and perform self-led due diligence reviews of the Agency's expenses. Staff no longer has to manually pull client invoices, scan them, mail them, and field questions from auditors.

"Having autonomy from grantors and giving them access to FileBound has been huge," said the Board Treasurer. "We don't have to reallocate resources away from our clients to support the auditors and the audit process while they're doing their assesment, and they have more power to

get their work done more efficiently. This matters a lot when you have a small team driving your mission."

Historically, audits took a long time for a myriad of reasons including fielding questions from auditors and retrieving supporting documentation. However with the addition of FileBound, the most recent audit took half the time compared to the previous audit period.

Looking to the future.

Moving forward, staff at Yonkers Community Action Program have plans to partner with FileBound's support team to expand automated workflow technology into other departments and processes, including Human Resources to manage the employee lifecycle.

"We created unique log ins for auditors and showed them how to search within FileBound, which minimized their questions and requests. They were able to get everything they needed—invoices, approval steps, copies of checks, and every step of the transactional process was right there to review. This capability has been exponentially helpful for our team. Our auditors have commented that the system is extremely user friendly."

— **Nadia Matthie**

Board Treasurer, Yonkers Community Action Program

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For more information visit: uplandsoftware.com/filebound

Upland FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.