An End-to-End Solution: A Time Tracking, Scheduling, Payroll & Custom Reporting Case Study

How Medical Record Associates uses **QuickBooks Time Tracking Software, MakeShift Scheduling, Dapt, & ADP Workforce Now®** to solve their *time tracking, scheduling, productivity reporting, & payroll needs.*

ABOUT THE CASE

For more than 35 years, Medical Record Associates (MRA) has provided flexible staffing and management for medical coding challenges. With a growing staff of 60+ coders who work remotely and VPN into hospital or medical systems, MRA supplements existing medical coding staff or serves as an outsourced medical coding team for billing for hospitals, emergency rooms, medical facilities, and physician offices. MRA supplies the exact coding specialists required for individual customers as their work volume and staffing needs fluctuate.

1-833-MRA-CODE
connect@mrahis.com
www.mrahis.com

CHALLENGES

Annual Savings $20,000

625 Hours Saved Annually

01 *Time Tracking*

- Most of MRA's customers require productivity number standards and the ability to monitor productivity rates. For example, when an employee clocks out, they have to indicate the number of Emergency records they coded during that shift. MRA needed a custom field to notate this productivity information in order to deliver productivity reports to their customers. Without a custom field, MRA had to rely on manually combing through the comment sections to notate the number of records completed per job type per shift, making it difficult to extract data to run reports in a simple way.

- Another big challenge MRA experienced was that customers would request a specific number of hours and specific types of job resources within the same contract. For example, a customer might request 20 hours of emergency room coding, 20 hours of inpatient coding and 20 hours of lab work coding. Employees might need to clock in for one job from 8am-10am, another type of job from 10am-12pm and another from 1pm-3pm for the same customer – all with different billing rates.

- MRA needed a way to keep track of the location of their remote workforce to ensure employees were working, were being compensated accurately, and to know whether or not they were on the clock in case they needed to be reached.

- MRA needed an easy-to-use and onboard time tracking solution for their employees.

CHALLENGES *(continued)*

02 *Scheduling*

MRA had major scheduling challenges as half of their staff worked on multiple jobs (record types) at multiple locations. They needed a way to publish a schedule in advance so customers could not cancel or change their service needs at the last minute as different types of coding require different skill sets.

03 *Custom Reporting*

Extracting employee productivity data to run customer reports would typically take about 20 hours per week.

INTEGRATED, RESULTS-DRIVEN SOLUTIONS

MRA was looking for a full-service solution to integrate payroll with time tracking, scheduling and custom reporting. MRA started using ADP Workforce Now for payroll in early 2019. Due to unique, industry-specific time tracking and scheduling challenges, ADP® recommended QuickBooks Time (available through ADP Marketplace). Then, QuickBooks Time recommended MakeShift, which integrates with both QuickBooks Time and ADP, to solve their scheduling challenges as well as Dapt to develop a customized productivity reporting solution.
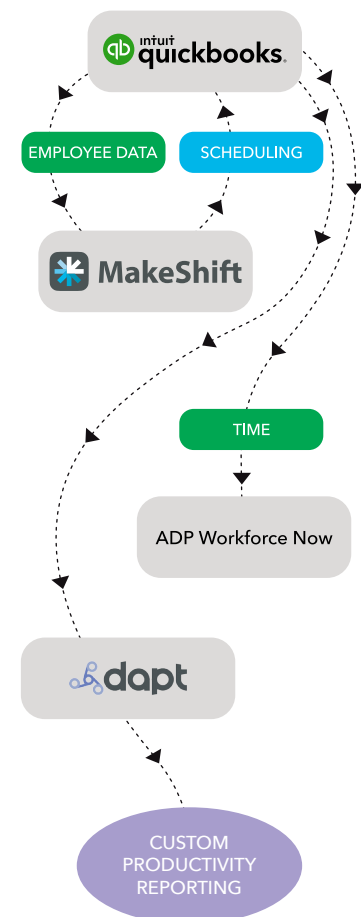
As a result of the end-to-end solution, MRA can now:

- ✓ Use QuickBooks Time to accommodate employee time tracking for multiple employees, who work in multiple locations performing multiple jobs at different billing rates. Through its custom field functionality, MRA is now able to monitor productivity rates and extract the data from the custom field rather than manually going through a note section. After doing due diligence, MRA determined no other time tracking app could provide them with this capability.

- ✓ Utilize QuickBooks Time's Who's Working Window to ensure their remote workforce is doing what they are supposed to be doing, see who is on the clock in case they need to get in touch with an individual, and ensure payroll accuracy. In fact, they have not had to cut one manual check for a payroll error!

- ✓ Create and publish a schedule with MakeShift to send to their customers for the upcoming month, giving them the opportunity to anticipate their coding/staffing needs and resources at various facilities. Now MRA is able to gain buy in and an upfront agreement for payment. Gone are the days of making adjustments and scrambling after the fact. Now their customers can review and decide what they might need in terms of more or less coverage in advance.

- ✓ Solve scheduling challenges to assign the right person for the right job with the right qualifications and coding knowledge.

- ✓ Create custom productivity reports with Dapt to distribute to customers, saving 20 hours per week.

> " *In the past we got so many complaints with the time tracking system we used. QuickBooks Time is extremely easy for our employees to learn. In fact, I've never received a single question. You just sign in, and clock in and out. They also provided us with the custom field functionality we needed to track productivity metrics, said Terry Conway, Vice President of Operations for MRA. By integrating with MakeShift, we gained easy customer scheduling capabilities. Now with Dapt, our custom reporting time will be greatly reduced, saving me more than 20 hours a week.*

Terry Conway
VP of Operations
Medical Record Associates

intuit **quickbooks**

EMPLOYEE DATA   SCHEDULING

MakeShift

TIME

ADP Workforce Now

dapt

CUSTOM PRODUCTIVITY REPORTING

Learn more about QuickBooks Time and MakeShift on ADP Marketplace.
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