

DocuSign makes compliance and paperwork easy for not-for-profits.

Carers ACT streamlines processes, builds productivity and keeps data secure. Putting carers at the heart of innovation.

Carers ACT is a non-profit organisation based in the Australian Capital Territory. Its mission is to support, connect and empower carers throughout the region. Its work ensures these indispensable members of our community have what they need to look after others and, just as importantly, themselves.

Compliance

Digitised processes keep pace with evolving compliance demands

Carers ACT deals with highly sensitive personal information and is committed to ensuring the security and privacy of its clients. This commitment was amplified in 2018 when the Australian Government introduced the Notifiable Data Breaches (NDB) scheme.

The NDB mandates that certain organisations must notify anyone affected by data breaches, if those breaches are likely to result in serious harm.

This prompted Carers ACT to conduct a review of its existing processes, research eSignature and agreement systems, and implement a new document management initiative.

Carers ACT turned to DocuSign for an agile software solution that allowed it to digitally sign and manage service-provider and National Disability Insurance Scheme (NDIS) agreements, streamline the organisation's scholarship-application process, and deploy effective Customer Relationship Management (CRM).

Security

Efficient third-party information management and greater security

When a carer approaches Carers ACT they are assessed to determine what supports would best fit their needs. At times, Carers ACT works with third-party suppliers to deliver these supports. The document that underpins this process is called a Brokered Purchase Order (BPO).

Due to the sensitive nature of information required by these third parties, and to ensure timely and appropriate delivery of service, it is imperative to securely and accurately transmit client details.

Results

650 hours saved

across approximately 1,300 broker purchases

“Implementing DocuSign at Carers ACT has revolutionised how we manage signed documents. This consistent, secure approach to document management has created efficiencies in the document signing process, as well as eliminating the need to chase and review document status”

Sharon Scott
Team Leader
Carer Support

Before implementing its new system, Carers ACT spent large amounts of time and resources ensuring the security and confidentiality of its clients' information during the BPO process. Since the beginning of the 2018-19 financial year, Carers ACT has sent approximately 1,300 BPOs through DocuSign, representing a saving to the organisation of approximately 650 staff-hours.

Future implementations: Data management Due diligence achieved with smart CRM software

When Carers ACT engages service providers, critical due-diligence procedures must be observed to meet regulatory and quality requirements. Carers ACT completes a manual due diligence process for service providers, which needs to be updated regularly. They plan to automate this process using the DocuSign for Dynamics 365 Customer Relationship Management (CRM) system.

Rather than manually tracking expiring due diligences and documentation, DocuSign for Dynamics 365 CRM will automatically send an electronic form for completion, capturing all relevant information and required documentation. This information will then be written back to DocuSign for Dynamics 365 CRM, requiring only a simple managerial review and approval.

This new process will mean the Carers ACT team no longer wastes valuable time on data entry, double-handling is eliminated and because staff will receive automatic prompts when tasks are due for completion, the likelihood of missed deadlines is minimised.

Scholarships for young carers

Young carers sometimes miss out on education opportunities due to time and financial constraints and the weight of their responsibilities. Carers ACT is dedicated to assisting young carers to pursue higher education and gain training qualifications. Supported by a local business, the organisation runs a scholarship program for these young carers.

To improve the scholarship-application process and ensure effective data collection, Carers ACT is set to implement DocuSign PowerForms. With DocuSign PowerForms, Carers ACT will generate the scholarship application forms that can be filled and signed with a secure e-signature.

Comprehensive solutions deliver greater efficiencies

By leveraging DocuSign agreement cloud technology, Carers ACT now has a modern and highly efficient system of agreement in place. It has also improved the security of client data transmission.

Automation has delivered significant process efficiencies and greater accuracy, so staff can now focus their efforts on their most important work: caring for carers.

“DocuSign has cut down our admin time significantly when completing Service Agreements with carers . Carers have found this process much easier than the previous paper-based system.”

Tracey Gullo
Aged Care Manager