



HOW ADVOCATES, INC. REDUCED AUDIT TIMELINES & STRENGTHENED COMPLIANCE

Streamlined documentation retrieval and submission capabilities helped reduce audit timelines by more than half

OVERVIEW

Advocates Incorporated (“Advocates”) is a person-centered nonprofit organization in Central New York dedicated to empowering individuals with developmental disabilities to shape their own lives and pursue meaningful futures. With more than 1,400 employees, the organization delivers a full range of supports—including Self Direction and Community Habilitation—that help people participate fully in their homes, schools, and communities in ways that reflect their goals, strengths, and interests.

BEFORE eVero

- ∞ 10 to 12-month audit timelines
- ∞ Paper-based documentation stored across multiple locations
- ∞ Manual retrieval, scanning, and file organization
- ∞ High staff effort and disruption during audits

AFTER eVero

- ∞ Audits completed 2x faster
- ∞ Instant access to all required documentation
- ∞ Fully digital submission process
- ∞ Streamlined workflows with minimal disruption

CHALLENGE

New York State I/DD providers must comply with extensive federal and state Medicaid regulations to ensure that funds are used appropriately. The Office for People With Developmental Disabilities (OPWDD) and the Office of the Medicaid Inspector General (OMIG) conduct routine audits to evaluate compliance, internal controls, and service quality. To meet these requirements, agencies must maintain complete and accurate documentation such as Life Plans, service notes, and expenditure records. Missing or incomplete documentation can lead to financial penalties or other corrective actions.

Audit requests typically come with tight deadlines and require agencies to produce documentation for randomly selected activities from a two- to three-year look-back period. For many providers, this means locating older records stored across multiple systems—or even in off-site storage—and converting them into secure digital files for submission. This process is time-consuming, labor-intensive, and stressful for staff.



The time savings we experienced using eVer^o was tremendous. Documentation was easy to find. We pulled the vast majority, if not all of the documentation right out of eVer^o to upload directly to the auditor portal. No more shuffling through stacks of papers.

- **Beth Henderson**, Associate Executive Director
Advocates Incorporated



BEFORE EVERO

Prior to implementing eVer^o, Advocates relied heavily on paper-based documentation.

Audit preparation involved:

- Locating records across filing cabinets and off-site storage facilities
- Reviewing and scanning documents into digital formats
- Organizing and preparing files for secure submission

This approach resulted in:

- Audit timelines of 10 to 12 months
- Significant staff time dedicated to manual processes
- Operational strain during audit periods
- Increased risk of delays due to document retrieval challenges

AFTER EVERO

With eVer^o, Advocates transitioned to a centralized, digital system for managing Life Plans and service documentation. All records are securely stored and easily searchable, allowing staff to locate required documentation and prepare submissions without manual handling quickly.

Key improvements include:

- Immediate access to years of documentation through search
- Direct digital upload to auditor portals
- Elimination of scanning and physical file retrieval
- A more consistent and reliable audit preparation process

The impact Advocates saw included:

- Audit timelines reduced from 10 to 12 months to under 4 months
- First OMIG audit completed with no issues identified
- Documentation retrieval reduced from hours or days to minutes
- Audit response process fully managed internally without additional support