



# CASE STUDY Diversified Opportunities Incorporated



Learn how Vertex's 17-year partnership with Diversified Opportunities Incorporated resulted in a fully integrated, modular system that streamlines operations, saves time, and enhances efficiency organization-wide.

## About Diversified Opportunities

Based in Wilson, North Carolina, Diversified Opportunities is dedicated to providing vocational evaluation, training, and job placement for individuals with disabilities aged 16 and older. For 50 years, their services have empowered individuals with disabilities or disadvantaged circumstances to earn an income and strive for independence.

Their 17-year partnership with Vertex has been central to achieving this mission. By using a comprehensive suite of tools like Client Payroll Manager, TimeWorks Plus, Business Central, Case Manager, Service Billing, and Intuition, the organization has streamlined its daily operations.

With a fully integrated system like Vertex, Diversified Opportunities staff can save time on administrative tasks and focus on making a meaningful impact on their clients' vocational outcomes.

## How Diversified Opportunities Got Started with Vertex

Diversified Opportunities's partnership with Vertex began over 17 years ago, when they realized a need for reliable financial management. The organization initially implemented Client Payroll Manager and Navision, which has since evolved into Business Central. And as Diversified Opportunities's needs grew, they sought more ways to streamline their expanding services by gradually integrating additional Vertex modules, including:

- Intuition
- Vocational Touch
- TimeWorks Plus
- Case Manager
- Service Billing
- Business Central - Assembly Management

Vocational Touch in particular, proved to be a "lifesaver." Its addition significantly streamlined time tracking and data entry for users, saving them valuable hours and boosting productivity organization-wide.



## Challenges Solved by Vertex

Before fully integrating Vertex into its operations, Diversified Opportunities relied on tools like QuickBooks and manual processes, which led to frequent errors, wasted time, and administrative inefficiency. Manual data entry was both time-consuming and prone to human error, which impacted overall accuracy.

As an existing Vertex customer for assembly, payroll and financial management, Diversified Opportunities recognized the potential of a fully integrated system. The ability for different modules to seamlessly pair together was a key factor in their decision to expand their use of the platform.

Since their transition to an integrated solution, Diversified Opportunities has realized immediate and substantial improvements. The integrated modules allowed them to automate and simplify core processes, thereby increasing accuracy and efficiency across the entire organization.



### Implementing the Documentation Grid to Adhere to North Carolina Regulations

A more recent challenge demonstrated the collaborative power of the partnership. When North Carolina mandated a new, complex “grid” format for all documentation, Diversified Opportunities was faced with a critical compliance issue. The Vertex team worked closely with Diversified Opportunities, engaging in multiple rounds of guidance and development to build the exact required format directly into the Case Manager module.

The solution was a resounding success. During two subsequent MCO (Managed Care Organization) monitorings, state officials were highly complimentary of the clear, compliant, and professional grids Diversified Opportunities was able to produce.



## How Diversified Opportunities Leverages Vertex Today

Today, Diversified Opportunities has 26 users serving over 100 individuals on any given day. As a result of this growing adoption and organizational expansion, Diversified Opportunities most recently added the Case Manager and Service Billing modules. These additions allowed them to cement a comprehensive, single-source solution for managing everything from client services to payroll and billing.

When asked to discuss the most impactful Vertex modules for them, the Diversified Opportunities team points to the tools that have delivered the most significant time savings:



### TimeWorksPlus

Saves key staff between one and two hours each week by replacing manual paper timesheet calculations with a unified digital system, providing a complete view of employee time.



### Vocational Time Module

Transitioned the organization from paper-based tracking to digital clock-ins on tablets and laptops, significantly reducing administrative work for multiple staff members and freeing up time for client-focused projects.



### Client Payroll Manager Integration

Seamlessly integrates with Business Central, simplifying processes such as item creation and customer setup, and streamlining daily operations.

The time saved across the board translates directly into cost savings and reduced errors. Processes that once took hours, like the weekly billing cycle that consumed up to three hours, now take less than 30 minutes.





## Where The Partnership is Headed Next

Beyond the software itself, Diversified Opportunities emphasizes the value of the partnership. They describe the customer service as phenomenal, noting that the responsive, timely support and the access to a dedicated point person for each module are critical to their success.

Looking ahead, Diversified Opportunities plans to continue collaborating with Vertex and is currently exploring a deeper integration to connect GL codes from Service Billing directly into Business Central. This change would streamline its financial tracking and eliminate the need to create a second invoice, creating a unified invoicing process.

Diversified Opportunities also actively participates as a key partner in testing new features, helping to refine and expedite the deployment of enhancements that benefit all Vertex users.

### Favorite Vertex Modules:



Vocational Time Module



TimeWorksPlus



Client Payroll Manager  
Integration



## Does Diversified Opportunities Recommend Vertex?

**Absolutely.** After 17 years with Vertex, Diversified Opportunities credits the partnership as a cornerstone of its operational growth and efficiency.

The organization deeply values responsive and knowledgeable customer support, noting the dedicated ticket system and team members who provide timely solutions and guidance. Diversified Opportunities appreciates the collaborative spirit, frequently acting as a testing partner for new upgrades and feature enhancements to help drive improvements.

Overall, Diversified Opportunities is impressed by the progress they've achieved alongside Vertex. The transition to integrated, user-friendly technology has simplified processes and enabled staff to focus more on their mission.

This long-standing relationship has brought measurable gains in productivity, accuracy, and innovation. For these reasons, Diversified Opportunities highly recommends Vertex as a partner for any IDD organization looking to streamline operations and make a meaningful impact on client outcomes.



### BY THE NUMBERS

**17** years as a customer

**26** total users

**100** individuals served each day



*Vertex Systems delivers superior information management solutions and support services that help unlock the potential of human services organizations and maximize their ability to make a difference. Our vision is to be the premier and preferred provider of information management products and services to human services agencies.*