



CASE STUDY **Functional Industries, Inc.**



Learn how a 3-year partnership with Vertex helped this Buffalo, Minnesota nonprofit strengthen EVV compliance, cut administrative time, and build a fully integrated case management, billing, and payroll system.

About Functional Industries

Based in Buffalo, Minnesota, Functional Industries has spent 53 years creating opportunities for individuals with developmental disabilities and others facing barriers to employment, including people with mental health conditions seeking support and community enrichment. Their mission is to create and promote innovative opportunities that reveal the natural potential of each person they serve.

Functional Industries offers a range of programs, including Day Support, Career Development training, Mental Health Employment services, advocacy and resource support, and contract work such as packaging, assembly, and cleaning, all aimed at building a path toward competitive, integrated employment.

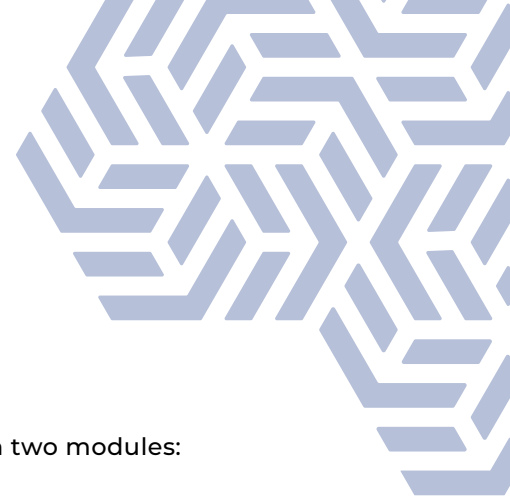
Today, Functional Industries relies on Vertex across 5 of its 6 programs, with more than 60 employees using the platform daily for Electronic Visit Verification (EVV), case management, billing, and client payroll.

How Functional Industries Got Started with Vertex

Functional Industries has partnered with Vertex for 3 years. Before making the switch, the organization used an open, largely manual system to capture payroll data. Because Functional Industries holds a 14(c) certificate, accurately tracking and proving that data was essential, and the old system made that difficult. It consumed a significant amount of staff time just to keep up.

The decision to change wasn't optional. The system Functional Industries relied on was being sunset, and they needed a new provider that could support both the transition and their EVV requirements. A referral introduced them to Vertex, and after a thorough discovery and demo process, Functional Industries made the switch.

The difference has been dramatic. Work that used to consume hours now takes a fraction of the time, and their billing specialist was able to move to part time because of how much the platform now handles on its own.



Onboarding: A Phased, Accuracy-First Approach

Rather than switching everything over at once, Functional Industries started with two modules:



Case
Manager



Billing
Manager

For the first two months, they ran both their old system and Vertex side by side during payroll to confirm accuracy before fully committing. Once they were confident in the results, they retired the legacy system completely.

Since then, Functional Industries has expanded its use of the platform to include:



Client Payroll
Manager
(CPM)



Electronic Visit
Verification
(EVV)



Vocational
Time Manager
(VTM)





Challenges Solved by Vertex

Before Vertex, Functional Industries lacked a reliable way to capture and prove the data required for licensing and state compliance. With their prior system heading toward sunset, they needed a partner who could close that gap immediately.

Vertex addressed this on multiple fronts:

- Capturing the licensing and state-required documentation Functional Industries needed
- Time stamping services as they were delivered
- Building in a clear approval process
- Providing documented proof that services were actually being rendered
- Keeping the Functional Industries team working inside Case Manager every day as part of their normal workflow



Staying Ahead of Minnesota's EVV Requirements

This compliance piece has taken on added weight given the current climate. With fraud investigations underway across human services providers in Minnesota, having a system that keeps an organization in daily compliance isn't just convenient, it's critical. Functional Industries reports that they've remained in compliance every single day since implementing Vertex's EVV module, giving them documented proof of service delivery exactly when it matters most.





How Functional Industries Leverages Vertex Today

Different teams at Functional Industries have gravitated toward different strengths of the platform:



Billing Manager

The favorite for the billing team, streamlining a process that used to take far more manual effort.



EVV

Kept Functional Industries in daily compliance, which the team considers more important now than ever given the state's fraud investigations.



Case Manager

A must-have solution among staff on the floor, who use it to run reports, complete documentation, and time stamp services quickly and easily.



Vocational Touch

Stands out as a favorite feature, especially among floor staff who use it directly.



Client Payroll Manager

The clear favorite of the payroll team, who rely on it daily.

Beyond the modules themselves, Functional Industries points to concrete, everyday time and cost savings:

- Eliminated stacks of paper that used to be part of daily operations
- Can pull data from any specific date with the push of a button
- Billing resource was able to go part-time



The Vertex Relationship

Functional Industries describes its relationship with the Vertex team as very good, highlighting the responsiveness of support in particular. When an issue comes up, someone starts working on it right away.

“The Vertex team is amazing to work with. If we have any issues, we can just call someone and they start working on it immediately. Having customer service at our fingertips is huge.”

Where The Partnership is Headed Next

Functional Industries is planning for continued growth, and sees more room to expand how it uses Vertex. One priority on the horizon: moving away from physical recordkeeping. The organization currently stores two rooms of hard copy paperwork and is beginning to look at electronic record-keeping solutions to replace

Favorite Vertex Modules:



Case Manager



Billing Manager



Client Payroll Manager



Does Functional Industries Recommend Vertex?

Absolutely. Especially in Minnesota, where the current landscape of fraud investigations makes electronic systems more important than ever.

Functional Industries has actively referred other providers to Vertex, particularly those still relying on pen-and-paper processes. As they see it, electronic service delivery is the direction the industry is heading, and Vertex offers something not every platform can: the ability to talk to a real person when it matters.

BY THE NUMBERS

3

years as a customer

60+

total users

5/6

programs running on Vertex

51

years serving the Buffalo, Minnesota community



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.