

► PURPOSECARE'S CASE STUDY WITH WORLDVIEW

How PurposeCare Reclaimed Time and Revenue Control with WorldView



INTRODUCTION

PurposeCare provides in-home healthcare across several states, focusing on patients who qualify for both Medicare and Medicaid. These are people with complex care needs who often move between home care and home health depending on their condition. That kind of patient journey requires precise coordination and fast, accurate paperwork.



In Indiana, Paula Kessler manages the Home Health division. She oversees operations in Indianapolis and Fort Wayne, where her team handles intake, documentation, physician orders, and billing. As the agency grew, the systems they had in place started falling behind. What used to be manageable with smaller volumes became a serious problem once their caseload expanded.

The tipping point came when they switched to a new EMR and lost key tools. WorldView stepped in to replace what they lost and added back efficiency, clarity, and time.

The Problem: Too Many Documents, Too Few Tools

Before using WorldView, PurposeCare relied exclusively on MatrixCare for documentation. While not perfect, that system allowed them to fax orders directly, track what had been sent and returned, and manage documents within a single view. When they changed EMRs, their original workflows no longer worked. Paula and her team were left with no way to send out orders in batches. There was no way to automatically follow up on unsigned documents. Most of the tracking had to happen by hand.



Wendy Barnard, Care Transition Coordinator in Indiana, says the change made a big impact—especially on basic tasks.

“Our previous EMR tracked missing orders, faxed in and out directly. [The new EMR] does not have that capability, so tracking would have been done on a spreadsheet, which is time-consuming.”



Time wasn't the only issue. Without a clear way to manage physician orders, the risk of missing key items rose. Unsigned orders couldn't be billed, and follow-ups took hours Wendy didn't have. The workflow was unreliable and frustrating. They also lost the ability to easily fax essential documents, creating more delays and workarounds for basic tasks.

Looking for a Fix



Paula had heard of WorldView through a pilot in another branch. She remembered the way it handled mass faxing and order tracking and brought it up during internal conversations. When PurposeCare opened its Fort Wayne location and completed its EMR change, Paula pushed for WorldView.

Her goal was simple. She wanted to send orders quickly, track them easily, and get them back without delay. She also wanted something that would scale with her team's needs.

"I just wanted the orders out and back. Easy. That's it," she said.

She appreciated that WorldView didn't force them into a package full of features they wouldn't use. They could choose what they needed and ignore the rest. That helped her stay on budget and gave her team the breathing room to learn the system at their own pace.

"I liked that we could pick and choose what we needed. That's very helpful," she added.



Easy Roadblocks

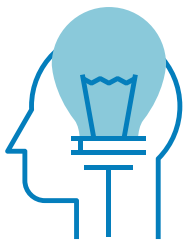
The initial rollout had some hang ups: Due to having a pilot program at another branch, Paula's team was added to a shared portal instead of given their own. While this was an attempt to get the teams on the same page, it actually caused confusion.



Paula spoke up. She explained that what they had wasn't working and asked to be moved to their own instance. Once that happened, things immediately approved.

"Once we got our own portal, it started working," Wendy said.

Both Paula and Wendy credit the WorldView team for turning things around. Audra helped resolve the early issues, and then Michael joined the project and became a steady, reliable point of contact.



"Michael is a wealth of knowledge. He explains things in a way we understand. And he tells us when the issue is on our side or the EMR's side, which helps us avoid going in circles," Paula said.



A Faster, Clearer Way to Work

After the initial issues were resolved, the team began to see the difference. WorldView gave them a single place to send, tag, split, and merge documents. More importantly, it gave Wendy a way to track what had been sent and what still needed attention. Paula noticed how much faster documents were getting into charts. She could check the system and find what she needed without asking for updates or digging through shared folders.



“I like that it's all managed right there. If I'm missing something or looking for something, I can find it,” she said.”

The biggest change came with physician orders. Wendy no longer had to manually resend anything. The system handled auto-faxing. Paula estimated that delays had dropped by about 90 percent since implementation.

“We don't have any more than 30 days. We have some right at 30 days, but that's a huge improvement. And I really like that Wendy doesn't have to touch anything to get the orders resent,” Paula said.

Better Documentation, Better Billing



The improved workflow didn't just help Wendy. It also helped the business. With orders getting back faster, the billing cycle sped up. That meant the team could close out cases sooner and bill without waiting on missing paperwork.

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"Getting those things back quicker means we're able to bill quicker. We're able to collect faster," Paula said.

WorldView also helped reduce stress on the clinical team. When changes came from the nurses, Wendy could update and resend documents without a long delay. That kept the patient charts accurate and helped maintain compliance.



Communication That Works

One of the reasons the system works so well for PurposeCare is the support behind it. Wendy has regular meetings with the WorldView team. She shares what's working, what isn't, and what could be improved. Those conversations often lead to updates and small changes that make her job easier.



“There’s a real back-and-forth that works. If I need something adjusted, they listen. They fix it. That matters,” Wendy said.

Paula doesn't need to manage those conversations herself. She trusts Wendy to raise any concerns. And because the response from the WorldView team has been consistent and clear, she can focus on other parts of the business.



“As long as Wendy’s happy, I’m happy. And she hasn’t had many complaints,” Paula said.



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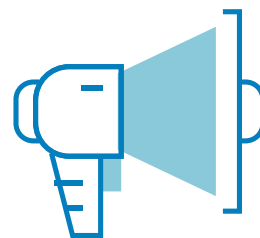
What Stands Out

When asked what she's most impressed by since the rollout, Paula didn't hesitate.

"The turnaround time. That's the biggest thing for me," she said.

The faster document handling has had ripple effects throughout the agency. The billing team spends less time waiting. The clinicians get faster responses. The medical records department has fewer loose ends. And when something does go wrong, Paula and Wendy feel supported.

"I definitely would recommend WorldView. The system is easy to use. And when something doesn't work, it gets fixed," Paula said.



How Wendy Barnard Uses WorldView to Keep Orders Moving



Wendy Barnard is the Care Transition Coordinator at PurposeCare. She's the main user of WorldView for the Indiana branches and plays a critical role in managing documentation. Her day revolves around making sure signed physician orders come back on time, patient charts are kept current, and no document falls through the cracks.

Before WorldView, her tracking process was manual. She relied on spreadsheets to flag missing orders and used email, fax, and phone calls to follow up with providers. The workload was constant, and it was difficult to prioritize because she didn't have a clear view of what had been sent, what was still pending, and what was returned. Now, WorldView handles the tracking and auto-faxing for her. That shift removed a major time burden from her role.

"Being given access to OnBase Unity Client has helped me significantly. I'm able to update, correct, and get needed documents back more quickly when changes are made by the clinical staff," she said.

Features that improved her daily workflow:

- Tags and notes help her identify what needs to be done with each document
- Split and merge tools allow her to manage multi-page files without exporting or using third-party tools
- Patient search make it easy to retrieve the right document without digging through folders

Although Wendy was the only team member working in medical records at the time of the interview, the plan was to add a second person soon. Paula noted that having this foundation in place would make it easier to onboard new staff, especially with the stability WorldView brought to their process her role.

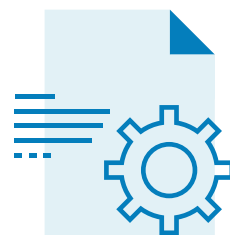
Measurable Impact

Paula didn't track every metric with a dashboard or spreadsheet, but the improvement was clear in weekly reports.

"Wendy reports to me every Monday how many orders we're waiting on. That number has gotten significantly better," Paula said.

She estimated a 90 percent improvement in order delays. The backlog that once plagued her team—orders stuck in queues or lost in manual tracking—was nearly eliminated.

"We don't have any more than 30 days. We have some right at 30 days, but it's nothing like it was before," she said.



Even more important, the remaining delays weren't because of WorldView. Paula pointed out that when orders were late, it was often due to provider-side issues or internal clinical delays, not a failure in the system. These results affected more than just paperwork. With faster document return, the agency could submit claims more quickly. Cash flow became more predictable, and the billing team spent less time chasing missing documents.



A Better Foundation for Growth

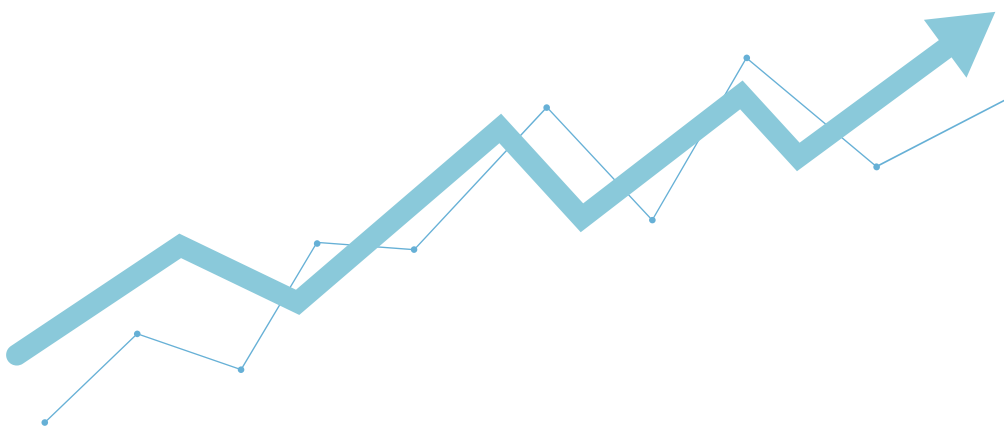
PurposeCare is planning to expand again, with a new branch scheduled to open in Southern Indiana next year. Based on her experience, Paula is confident that WorldView will continue to support that growth. When another large branch in Cincinnati came onboard, Paula made sure to share lessons learned during the Indiana rollout.

“If you don’t get this fixed before Cincinnati starts, it’s going to be worse. They’re a much bigger agency,” she told the internal teams. That push helped drive the decision to create separate portals for each location, a move that smoothed implementation across the board.

Wendy also continues to advocate for improvements. She’s in regular contact with Michael and James from the WorldView team. Their communication has been clear, technical when needed, and focused on real fixes. Wendy, being tech-savvy, understands the backend details, and Paula trusts her judgement.



“Wendy does all of it. She even makes spreadsheets for me, and everybody always compliments them. I can’t take credit. That’s all Wendy,” Paula said.



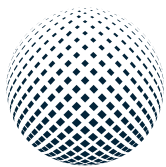
Final Takeaways

WorldView gave PurposeCare the tools to stop relying on patchwork solutions. The agency replaced spreadsheets, removed delays, and gave their team a more manageable workload. Paula and Wendy now spend less time troubleshooting documents and more time focusing on patient care.

Paula summed it up clearly: “I definitely would recommend WorldView. The system is easy to use. And when something doesn’t work, it gets fixed.”

This case study shows that even in complex, growing healthcare organizations, clear documentation workflows can be restored. PurposeCare didn't need a dramatic overhaul. They just needed tools that worked the way they worked.

And WorldView gave them exactly that.



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