



Leaps & Bounds uses HIPAA-secure digital forms to accelerate patient intake and simplify therapist case notes documentation, resulting in a 60% reduction in time spent completing these processes.

**INDUSTRY**

Engineering

**CUSTOMER SINCE**

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**FORMS**

- Patient Intake Forms
- Therapist Case Notes

# At-A-Glance

## Challenge

Leaps & Bounds Family Services needed a digital form solution to accelerate therapist documentation processes, streamline patient communication, and standardize data capture. Their paper-based documents and fillable PDFs resulted in delayed form delivery, incomplete data, and incompatible compliance processes.

## Solution

Leaps & Bounds Family Services turned to GoFormz to digitize their documents for HIPAA-secure data collection and capture. Leveraging the Public Forms feature, Leaps & Bounds Family Services can link to online patient intake forms from their website or client communications, allowing the families of patients to complete and submit their intake forms within minutes, from anywhere. The ability to fill out and complete forms from mobile devices now allows therapists to utilize the Speech-to-Text feature to dictate case notes as they commute from one appointment to the next – rather than waiting to complete documents at the end of the day or week. These digital efficiencies have resulted in a 60% reduction in time spent completing, delivering, and processing forms.

## Results

- 60% reduction of time spent on documentation and associated processing
- More complete, accurate data via Required fields and form logic
- Simplified collaboration with patient families via the Public Forms form sharing feature
- HIPAA-secure data capture protects patient and family privacy
- Simplified collection of insurance card information via Image fields
- Improved case note efficiencies for therapists via the Speech-to-Text feature

## Why GoFormz

*“We have cut down the time that it takes to complete our documentation processes by more than 60%.”*

*– Benjamin Delgado, Founder, Leaps & Bounds Family Services Inc.*

## About Leaps & Bounds Family Services Inc.



Leaps & Bounds Family Services provides early intervention services “to help children develop, grow and learn during the early years of life”. Founded in 2005, the practice functions upon the belief that “young children learn best through everyday experiences and interactions with familiar people in familiar situations”.

# The Full Story

## Room for improvement

Leaps & Bounds Family Services strives to provide impactful, efficient care to the families of children with special needs. “We provide multidisciplinary therapeutic services, such as speech, occupational, physical and developmental therapies to children with special needs,” explained Benjamin Delgado, founder of Leaps & Bounds Family Services. “We serve families privately and within the context of our state’s IDEA Part C early intervention system.”

These therapeutic services, as well as patient intake, require thorough and frequent documentation. “We have a lot of forms and documents that we have to fill out, like consent forms and staff therapy notes, and we were doing that all by hand. It was all paper copy.” Manual documentation resulted in frequent form delivery delays, incomplete documents, and burdensome, time-consuming paperwork for therapists already balancing a variety of appointments. These tasks resulted in inefficiencies not only for Leaps & Bounds personnel, but

also the families they served. “We’re talking about young children with special needs. These families have multiple appointments, the day goes by really quickly in trying to address the needs of their children,” explained Benjamin.

Realizing it was time to optimize Leaps & Bounds documentation and processing, Benjamin began his search for a digital solution to paper forms.

## Turning to digital

“We had tried to create forms in Word or as fillable PDFs,” Benjamin explained of their initial search for a digital solution. “But the problem was that it all depended on the technology each of our therapists were using and what capacity they were able to use that technology... some things worked, some things didn’t.” Often, when completing Word documents Leaps & Bounds therapists struggled with formatting errors and processes that did not align with their available technology. “That made us ask where we could find a solution that would allow people, from the various places that they work from, to be able to fill out these documents and forms in a way that was efficient, easy, and aligned

with how they do things,” Benjamin recalled. “And that’s when we found GoFormz – it was something that allowed us to use our own forms and processes, and it’s worked out wonderfully.”

The GoFormz onboarding process went smoothly for Benjamin and his team. “It was pretty intuitive. All I needed was a PDF version of my form, I uploaded it, and it’s pretty easy to just drag-and-drop what I needed,” Benjamin detailed. “Within a matter of minutes from activating my subscription, I could create my first form and it was ready to use – without any help!” Using the GoFormz drag-and-drop form builder, Benjamin was able to easily add all of the fields he needed and equip them with logic to ensure data was entered completely and correctly. For example, by making fields Required, Benjamin could easily ensure that critical fields would be completed correctly prior to the form’s submission.

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## **HIPAA compliance**

An added benefit of selecting the GoFormz platform was the release of a HIPAA-secure edition. “HIPAA compliance is very important to us, as we are in the healthcare field,” Benjamin explained. “Being able to maintain a family’s privacy is of the utmost importance, and one of the things that has really helped is that GoFormz allows us to use HIPAA compliant forms to gather information from families.” For example, Leaps & Bounds Family Services now leverages GoFormz to complete Patient Intake forms, which require the input of a child’s protected health information, as well as a photo of their insurance card input directly into the form via Image fields. With HIPAA-secure data capture, Leaps & Bounds can leverage the efficiency of these digital features, while prioritizing their patients’ safety.

## **Case notes, optimized**

The first form Benjamin digitized for his team was the Case Note Form, their most commonly used document. “The first form I created was one of our Case Note Forms, which our therapists have to fill out when they complete a therapy session, because that was one of the main documents I wanted to make sure our therapists could use,” Benjamin

explained, emphasizing just how critical it was for their chosen digital solution to meet their case note needs. "This is a process that we have to complete multiple times in a day, so if this worked, then we knew we had a good foundation to [digitize] the other forms we needed."

The Case Note Form is used by therapists to document observations from their appointments. Leaps & Bounds therapists visit their patients at their homes or at locations within their community, to help the families of patients best care for their children within settings they frequent. "Our philosophy is that we want to teach families how to work with their children within the context of their natural environment and the places that they are most familiar, which is their home or community." This process requires Leaps & Bounds therapists to travel between patient locations, making it difficult to find the time to complete Case Note documents between appointments.

With digital Case Note forms, documenting appointments has become far simpler. "It worked out great, it was very easy and the therapists were very responsive,"

Benjamin explained. "Because they can use the GoFormz app on their cell phones, they can use speech-to-text to complete the form. So within the drive from one appointment to the next, they are able to fill out their forms. They really enjoy it, to this day, we've gotten great feedback."

### **Time savings for all**

Digital forms have resulted in transformative efficiency optimizations across Leaps & Bounds' documentation and patient intake processes. Utilizing the GoFormz Public Forms feature (which allows users to share links to their forms for individuals outside of their account to fill out and complete) Leaps & Bounds can now post links to patient intake forms on their website or email them directly to clients.

"Before, we would have them fill out a form, send a picture of their insurance card along with their doctor's information and fill out our privacy policy... Those tasks took several phone calls, as well as mailing documents back and forth," Benjamin described their workflow before using GoFormz. "Now I send patients a link and they fill it out. Nothing is missing because I can add Required fields in the document, and

their insurance card is added as a picture right into the form... and it's done."

Once a form is completed, Benjamin is immediately notified, allowing him to act quickly and further accelerate processing. "I then get an email back saying they completed their form, and I can download the form and put it into our electronic management system. I don't have to ask for any additional information, it's all there."

This process has not only resulted in efficiency optimizations for Leaps & Bounds, but also for the families of patients they serve. "If you can send something out that takes only minutes to complete, and you don't have to worry about mailing it back or postage... it really makes the life of the family easier and it puts us at an advantage amongst other providers who might take longer with those processes," Benjamin explained. "I was able to make their process easier because of GoFormz."

## ROI

Leaps & Bounds Family Services Inc has witnessed impactful efficiency improvements leveraging HIPAA-secure digital forms and the Public Forms

feature. With more accessible, streamlined documentation, forms are completed faster and require no manual form delivery (like mailing, scanning, etc.), which in turn eliminates obstacles to billing and patient care. "I would say that we have cut down the time that it takes to complete our documentation processes by more than 60%."

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