



The California Medical Association Manages Complex Billing with ClearVantage

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- Shirley Wtulich
Director of Information Technology, CMA

Managing the CMA's Complex Billing Structure

CMA is comprised of 39 component societies, each of which plays a vital role in the overall operation of CMA. "We are a uniquely structured organization," notes CMA's Director of Information Technology, Shirley Wtulich. "Each of CMA's individual components represents multiple counties within California. What sets CMA apart from some other associations internally, is our complicated dues and billing process. Unlike many organizations whose parent entity manages the billing for all of its separate divisions, CMA works from the bottom up, meaning that each county bills and creates invoices for its respective component society who, in turn, bills and invoices us. In essence, each of our 39 divisions is responsible for the billing of three bodies: itself, CMA, and the American Medical Association (AMA), with whom we do work on the national level. Further, this complex structure, coupled with our organization's size and rapidly growing member base, fueled a demand for an association management software (AMS) that would help us streamline the communication and work flow amongst our 39 societies."

The search for a robust AMS that would suit CMA's needs had not been a new endeavor for the association. "One of the biggest challenges we faced when looking for an AMS in the past was to find one that would actually be able to handle our intricate methods of doing business," continues Wtulich. "The fact is, we had tried multiple vendors over the past ten years, all of whom were unable to successfully implement and tailor their software to our systems. Needless to say, after all these attempts, both our staff and members were understandably skeptical about taking on another project that would take thousands of hours and could potentially fail. In addition, the relationship between our staff and the implementation team of the AMS vendor was particularly important to us. We needed a team of skilled experts that would not only be able to convert over 20 years of CMA's data onto a new system, but would also have an unconditional commitment to the success of the project. After 30 proposals and intense scrutiny of each AMS in consideration by CMA's staff, county staff, and physician members, one vendor and software solution came out on top above all the rest: Euclid Technology and ClearVantage. Our experience since then has confirmed that we absolutely made the right choice in going with Euclid."

Euclid quickly went to work with CMA to implement ClearVantage. The first step was to create a more efficient method for the organization's intricate dues and billing process. "Our old system of receiving invoices from our 39 component societies created unnecessary 'fluff' that required a tedious cross-checking process by different staff members," states Wtulich. "In other words, we had too much garbage coming in [in the form of redundant information] and no method of filtering out what we did and did not need [without manually checking the data]. However, Euclid quickly helped solve this problem by creating a dues transmittal process through ClearVantage in which each of our 39 chapters can submit their invoices to us directly in 'batches.' This batch management system gives us a built-in monitoring

Customer Profile:



California Medical Association

Headquartered in Sacramento, the California Medical Association (CMA) is a professional association that represents approximately 35,000 physicians, residents, and medical students throughout the state of California. Founded in 1856, its mission is to promote the science and art of medicine, the protection of public health, and the betterment of the medical profession.

Challenge:

Managing a complex dues and billing system of 39 separate subsidiary organizations

Solution:

Euclid set up a system where the 39 subsidiaries could submit dues directly in batches through ClearVantage

Results:

CMA increased billing efficiency and eliminated double-entry of data by adopting ClearVantage

mechanism so that we can see exactly what each county or society is sending to us. We are now able to preview, post, and essentially filter out exactly what we need through ClearVantage and not through multiple databases, which we were previously accustomed to doing. On top of this, Euclid's team was able to build a fully customized automatic error checking function into the batch management system. This function issues a unique ID for each member of our organization. With this added convenience, ClearVantage automatically validates that the right invoice is going to the correct member, effectively eliminating manual error/data checking and alleviating the stress that was once prevalent throughout our accounting department."

CMA Implements ClearVantage's Advanced Web Functionality

Though the streamlining of CMA's billing process is one of the biggest benefits that it has seen since "going live" with the software, CMA is equally impressed by ClearVantage's web functionality. "With ClearVantage Web, our members' online experience will be greatly enhanced. Each member of our organization will be able to log in and have his or her own 'personal space' within the CMA website," states Wtulich. "ClearVantage Web will allow each member to create a customized profile while giving that particular member a detailed history of his involvement with and benefit to CMA – i.e. dues paid, donations offered, committees joined, and events attended. And that's not all. With ClearVantage's online Chapter Leader Access System (CLAS), we are now able to more efficiently communicate with the heads of each of our 39 societies while simultaneously monitoring the activity of each individual component – all in real time. ClearVantage's ability to take our organization's information and place it into one centralized database has not only given us "one stop" access to just about all the information we need in, but it has also taken that same information (that once required the cooperation of various organizational departments to obtain) and made it more transparent and easier to understand."

Ms. Wtulich concludes that the success of this project could not have come to fruition without Euclid's outstanding project team. "From the start, it became quickly evident that Euclid's team of experts was dedicated to the success of this project no matter what," finished Wtulich. "From promptly answering all of our questions, to consistently developing the right solutions for our organization without impacting the agreements we had in the original contract, Euclid's project members showed exceptional dedication in making sure all of our needs were met."

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Director of IT
CMA

About Euclid Technology:

Located in Bethesda, Maryland, Euclid provides premier enterprise software solutions, content management systems, and mobile web solutions to associations and other member-based organizations. Established in 1997, Euclid delivers superior products and services to such clients as: the American Forest Foundation, the South Carolina Bar Association, the National Association of College and University Attorneys, the California Medical Association, the Educational Theatre Association and more.

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