

GUIDE

The Compliance & Workforce Engine Playbook

How Behavioral Health Organizations Align Workforce, Funding, and Compliance



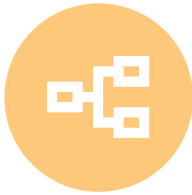
Introduction

Behavioral health organizations don't struggle because they lack systems. They struggle because their systems don't reflect how they actually operate. Workforce data lives in one place. Financial data lives in another. Program data lives somewhere else entirely. And the one thing that connects all three—funding—is often the least visible. This playbook outlines a new model: A Compliance & Workforce Engine that connects staffing, funding, and operations in a single system.

SECTION 01

The Real Problem

Most organizations treat these as the same thing—but they're not.



Approved

A role exists on an org chart



Budgeted

A role has been planned for financially



Funded

A role is supported by real revenue (contract, grant, or services)

This gap is where workforce and financial misalignment begins.

Workforce Visibility Is Broken

Most organizations cannot clearly answer:

- Which roles are fully funded
- How labor costs map to programs or services
- Where financial exposure exists

Instead, they rely on:

- Spreadsheets
- Manual reconciliation
- Disconnected systems

This creates delays, errors, and risk.

The Cost of Disconnection

BEFORE

Disconnected Systems

Labor Tracked in HR system

Funding tracked in finance system

Programs tracked separately

Manual reconciliation required

Limited confidence in data

AFTER

Workforce Engine Model

Workforce tied directly to funding

Labor visible across programs and services

Real-time alignment
between staffing and revenue

No spreadsheets required

Confidence in every workforce decision

When workforce and funding aren't aligned:

- Unfunded roles go unnoticed
- Labor costs drift from revenue
- Compliance risk increases
- Decision-making slows down

This isn't an HR problem.

It's an operating model problem.



How Behavioral Health Actually Works

Two Core Funding Models

Behavioral health organizations operate across:



Contract-Based Funding

- Fixed funding tied to programs
- Requires strict cost allocation



Fee-for-Service

- Revenue based on services delivered
- Requires dynamic labor allocation

Most organizations operate in a hybrid of both.

Why Traditional Systems Fail

Traditional HCM systems track:

- Employees
- Departments
- Payroll

But they do not track:

- Funding relationships
- Program-level labor
- Service-based costing



What Is a Workforce Engine?

What is a Workforce Engine?

A Workforce Engine connects:

- Positions
- People
- Funding sources
- Programs
- Services

Into a single, structured system.

The Foundation: Position Control

Position Control ensures:

- Every role is approved
- Every role is tied to funding
- Every hire aligns with organizational structure

Without this foundation, visibility breaks immediately.

The DATIS Difference: Structured Workforce + Cost Capture Flexibility

Position Control is only the starting point.

What makes DATIS different is how it extends beyond structure into how costs are captured and allocated.

DATIS supports multiple ways to capture and allocate labor costs depending on how an organization operates, including:

- Fixed allocations for contract-based funding
- Dynamic allocations for fee-for-service models
- Service-driven costing via EHR integration
- Program or funding-based distribution models

This flexibility allows organizations to align workforce costing with real-world funding models—rather than forcing operations into rigid system constraints.

Instead of adapting your processes to fit the system, the system adapts to how your organization gets paid.



Positions



People



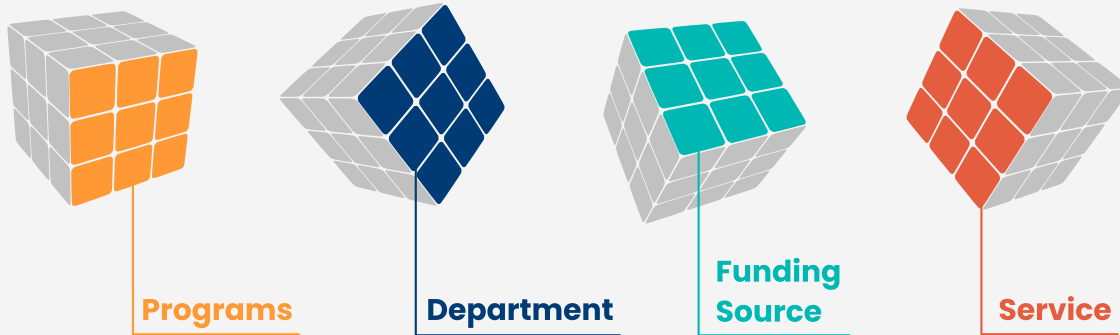
Funding Sources



Programs



Services



The Workforce Rubik's Cube

Imagine your workforce like a Rubik's Cube.

Each side represents a different dimension:

- Program
- Department
- Funding source
- Service

Traditional systems let you look at only one side at a time.

DATIS allows you to rotate the cube—so you can analyze the same workforce across multiple dimensions without losing context.

This is what enables true visibility.

Multi-Dimensional Workforce Data

High-performing organizations don't view workforce in one dimension.

They view it across:

- Program
- Department
- Funding source
- Service

This creates true operational visibility.

The DATIS Difference: Multi-Dimensional Labor Intelligence

Most systems force organizations into a single structure—typically department-based.

DATIS enables organizations to define multiple dimensions that reflect how they actually operate. This includes:

- Programs vs. departments (at the same level of analysis)
- Funding sources (contract, grant, fee-for-service)
- Services delivered
- Locations, business lines, and more

This creates a flexible model where labor can be analyzed from multiple perspectives—without duplicating data or relying on spreadsheets.

Instead of asking:

- “What department does this employee belong to?”

Organizations can answer:

- “What program, funding source, and service is this labor tied to?”

This is what enables true workforce and financial alignment.

Connecting Workforce to Funding

Funded vs. Unfunded Roles

Most organizations track headcount.

Few track whether roles are actually funded.

This leads to:

- Overstaffing in underfunded programs
- Misaligned labor costs

Labor Allocation That Reflects Reality

Labor should be tied to:

- Programs
- Funding sources
- Services delivered

This allows organizations to:

- Understand true costs
- Align staffing with revenue

The DATIS Difference: Service-Based Costing via EHR Integration

In fee-for-service environments, labor allocation becomes significantly more complex.

Clinicians may see multiple clients in a day—each with a different payer or funding source. Asking staff to manually code every interaction is unrealistic and leads to low compliance and inaccurate data.

DATIS solves this by integrating with EHR systems to capture service-level data and apply it to workforce costing.

This enables:

- Automatic allocation of labor based on services delivered
- Accurate distribution of time across funding sources
- Reduced administrative burden on clinicians

For example:

- If a clinician works 8 hours but delivers services tied to multiple funding sources, DATIS can allocate that time proportionally based on actual service data

This creates a level of accuracy that manual processes and traditional systems cannot achieve.



SECTION 05

Compliance by Design

The Problem with Reactive Compliance

Compliance is often:

- Manual
- Time-consuming
- Retrospective

A Better Approach

When workforce and funding are connected:

- Data is consistent
- Reporting is accurate
- Audit readiness is continuous

Compliance becomes a byproduct—not a burden.

SECTION 06

What This Enables

Organizations that implement this model gain:

Financial Clarity

- Know if programs are fully funded
- Understand labor cost vs. revenue

Operational Visibility

- See workforce across programs and services
- Adjust staffing in real time

Reduced Risk

- Improve audit readiness
- Reduce compliance exposure



4 Content Pillars

Workforce Visibility

Know which roles are approved, funded, and filled

Financial Alignment

Map labor costs to programs, funding sources, and services

Compliance by Design

Audit readiness as a byproduct of connected systems

Reduced Admin Burden

Less manual work, more time on mission

Getting Started

Key Questions to Ask

- Do we know which roles are fully funded?
- Can we see labor across programs and funding sources?
- How quickly can we respond to funding changes?

First Step

Most organizations don't need to start with technology.

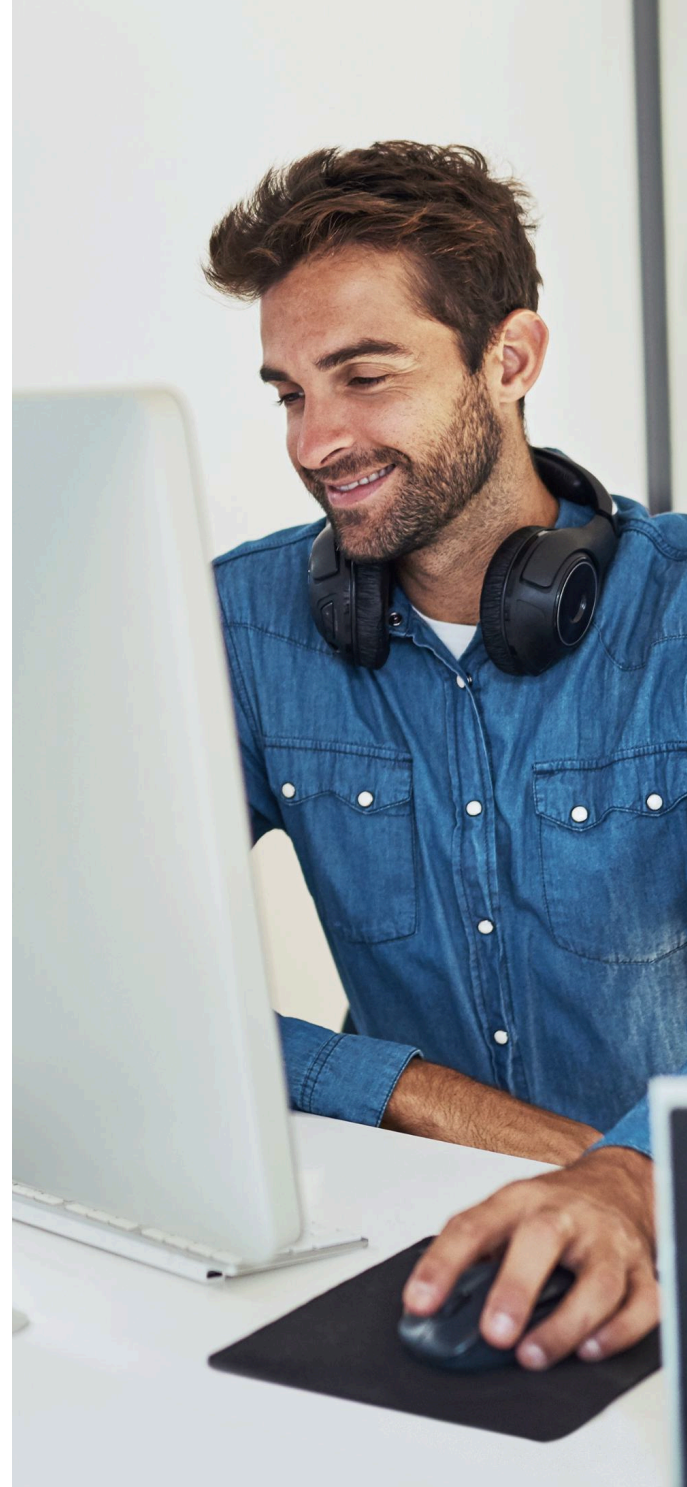
They need to start with visibility.

Is Your Workforce Fully Funded?

Understand where your organization stands today. Request a Workforce Funding Assessment.

[Start Your Workforce Funding Assessment](#)

Free.
30 minutes.
Actionable
Results.



About DATIS

DATIS is a Human Capital Management platform built specifically for behavioral health organizations.

It connects workforce data to funding, programs, and compliance requirements –giving organizations the visibility they need to operate effectively.