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Case Study:

A Pennsylvania Medical Center Re-engineering Invoice Processing with eForms and Dashboards

A large Pennsylvania medical center processes more than 200,000 invoices each year. In January of 2016, the medical center took over operations at a hospital that is headquartered at a different geographical location. The medical center was tasked with processing the acquired hospital's 50,000 annual invoices—a 25% increase—without hiring additional staff.

The medical center addressed these challenges by implementing DocFinity enterprise content management (ECM) software at the hospital. DocFinity eForms and Dashboards were used to enable improved tracking, transparency, accuracy, and turnaround for the hospital's Request for Payment (RFP) process. Preliminary results show that their average processing time at initial deployment was reduced by almost 50%, from 27 days to 15 days.

Using electronic forms (eForms) to improve process efficiency

A system analyst at the medical center recalls, "At the time of the acquisition, the hospital's RFP process was semi-automated. But they still relied on passing documents from one person to another for approval. It was hard to see who was assigned to specific invoices, and how far along the invoices were in the process."

He says, "We took a long-term view for optimizing the RFP processes. Our first step was to deploy DocFinity at the hospital, and capture invoices upon receipt. This set us up to automate much of the process."

The systems analyst used DocFinity eForms and BPM/Workflow to improve the invoice process at the hospital. Their Request for Payment eForm helps to accelerate turnaround in the following ways:

- An integration with Lawson uploads invoice information based on data collected throughout the approval process, eliminating hours of manual data entry.
- Invoices for sums greater than $10,000 are automatically routed to an administrative approval process.
- Line items are broken out, ensuring that the invoice total matches the sum of the line items.
- Email notifications are sent automatically when users are required to perform specific jobs.
- Users can track where invoices are at each step of the approval process.
- A validation step ensures that invoice numbers in the DocFinity system match those in the hospital's Lawson accounting system.

Improved visibility with tracking and monitoring

The systems analyst recognized that improved visibility could also help expedite the RFP process. He explains, "DocFinity let us provide search capabilities to help users help themselves. Now, they can track exactly where a specific invoice is in the approval process.

When an authorized user keys in an invoice number, she can quickly see the person that the invoice is assigned to, and how far along it is in the process. The search also shows whether an invoice has not yet been assigned, and is sitting in a common queue awaiting processing."

The improved visibility is an elegant solution to a pressing challenge. In the past, Accounts Payable would receive calls and emails every day requesting information about specific invoices:

- When did the invoice get paid?
- Where was it in the payment process?
- Who was processing it?
- How long has a staff member had the invoice?

The systems analyst continues, "When staff had to track down payment information, it took time away from their ability to do their jobs. With the improved visibility, the information that they need is available at their fingertips."

Dashboards for improved monitoring

Management at the hospital gained better visibility into the RFP process as part of the automation project. The systems analyst set up DocFinity Dashboards to help them better monitor invoice processing. The software enables them to see, at a glance, whether certain invoices are taking longer than others to process.

The systems analyst explains, "We set up a dashboard that shows the total dollar amount that is in the approval process right now. Another chart shows what is assigned to the hospital's cost centers. We also have a pie chart that breaks down—by dollar amount—the invoices that are sitting at every job node.

"If the user clicks on a specific piece of pie on the chart, he can see every cost center that has an invoice assigned to it. He can also see the total —by dollar amount—of what is in that queue. When the user clicks on a department, he can see specific details about the invoice that is out there—invoice number, invoice amount, vendor name, and aging.

"When a manager sorts on the aging column, she can see which invoices have been awaiting processing for a while. The information enables her to keep the process moving efficiently. DocFinity even allows managers to retrieve a specific scanned invoice. They can see the invoice, as well as any metadata associated with it— diary entries, the document history, or anything else that's provided in a search result."

Plans for the future

The systems analyst is using the process at the hospital as a prototype to eventually deploy at the medical center—Phase Two of this project. The medical center has four times as many cost centers, users, and invoices per year.

The systems analyst says, "We're going to take the next six months to make that process more efficient. Accelerating the RFP process at the hospital with 50,000 invoices will be a lot different than doing it at the medical center with 200,000 invoices. We are looking forward to the future and seeing how we can further enhance this process at each location."

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