

Capital Cardiology Associates, PC

ECM with Integrated AP Invoice Processing Yields Reduced Costs and Improved Workflow for Medical Offices



INTEGRATED

Industry: Healthcare

Business Solution: docSTAR Document Management Software integrated with Sage ERP

Business Challenge: Save time, reduce costs, manage compliance and streamline Accounts Payable

Capital Cardiology Associates, PC (CCA) has more than 25 board certified physicians in seven locations throughout upstate New York and western Massachusetts. CCA provides a range of diagnostic, interventional and preventative services in the treatment of cardiovascular diseases – and they do so with a caring, well-qualified staff and a comfortable, supportive atmosphere.

In 2012, CCA found that their paper-based processes were beginning to incur unnecessary costs and inhibit their outstanding patient services. Time, overwhelming storage space requirements and the potential liability of misplaced documents were only some of the notable factors leaving CCA's administration dismayed with their existing document management system.

As CCA's accounting controller, Denise Johnson and her team handle everything from financial statements to accounts payable. She oversees the accounting department and knows too well the level of moving documents that not only float from desk to desk, but often from Albany to Oneonta or even out of state.

Johnson's intimate understanding of the flow of documents across the breadth of CCA's practice made her the ideal lead in their search for a sophisticated, user-friendly document management system.

Impetus to Engage ECM

Prior to choosing new software, CCA was "totally paper driven," Johnson said, which slowed down nearly every aspect of the daily workflow processes. "We had been trying to condense our nonclinical space throughout the company but also the storage factor. Every year we'd send the entire year's worth of paperwork off to storage because that's what you have: tons of paper boxed up and that tends to get expensive." This system proved not only expensive, but also terribly outdated in a field that is consistently at the cutting edge of integrating new technology to boost efficiency and patient health.

However, staying apace with technology wasn't the only reason for choosing docSTAR explained Johnson, "Our billing department had started to send some of their employees to work from home and that got us thinking about 'what are the barriers preventing us from working from home?' " Even though the accounting department was small, Johnson saw that the ability to access software remotely would have exponentially positive results.

"For personal reasons, some of our employees needed to work from home and it was very hard trekking that paper back and forth from the office," noted Johnson. The docSTAR solution offered her department the flexibility and accessibility needed to leverage telecommuting opportunities for staff, as well as a far more intelligent platform for moving and managing documents.

Along with this flexibility, CCA chose to work with docSTAR because it could integrate so seamlessly with their accounting software, **Sage MAS 90**. Previously, there was tremendous hassle in having to go back and forth between different software: "We didn't want to have that extra step of having to go into another software to search for an invoice." With docSTAR, Johnson and her team were able to simply press the retrieve button right from within Sage MAS 90 and the invoice was immediately in front of them.

Together, the simplistic flexibility and the seamless integration pushed CCA directly to the docSTAR solution. Johnson relays that competitor alternatives simply did not provide the solutions they were looking for, leaving docSTAR as the obvious answer.

Implementation Sensation

Switching from a hard copy, or paper dominated, system to integrated electronic document management software proved to be relatively painless for Johnson and her department at CCA.

Despite initial trepidations about docSTAR's capabilities, Johnson relays how supportive and positive the docSTAR team was: "There were a couple things we said 'we're not sure how docSTAR is going to be able to do this,' but the docSTAR Professional Services team was able to assure us that they could absolutely take care of it and that we didn't need to worry about it. They sat down with us during the implementation process to let us know that no matter what we could throw at them, the docSTAR team would come up with a solution."

Though there were a few minor setbacks, Johnson raved about the implementation of the docSTAR software and, even more notably, the docSTAR team. "I think one of the nice things that we found," she noted with real joy, "was that docSTAR was also using Sage MAS90 for their accounting software, so they were able to bring us over to their office and show us how they were able to integrate it into *their* situation. They set up a little test scenario and showed us how the invoice comes in, showing us the whole process right there on their software."

This personal connection and individualized attention were present from the start of the relationship, leaving Johnson and the rest of CCA's team unarguably impressed.

Attainment of Improved Workflow & Reduced Costs

After the integration was complete, CCA rolled out docSTAR into their accounting department. There were multiple early successes, including same-day approval processes, improved accountability, reduced printing costs and accessibility to early pay AP discounts.

Same-Day Approval Process: With the new digital system, approval processes have drastically sped up. As Johnson suggested, there are “a ton of managers” from diagnostic, CT, nuclear, administrative and clinical departments, all approving a lot of different documents. With the old-fashioned process, these approvals weren’t being processed as quickly as they could be.

As an example, Johnson explained their paper-based workflow for accounts payable invoices: “The invoice would come to us in the mail; then we would send it out to the corresponding manager. It would sit on their desk for a day or two, then they would send it back and we would wait to send it out.” These unnecessary steps dragged down the efficiency of the workflow, adding time and presenting the risk of losing the invoice.

“But now, the manager gets an email saying that they have an invoice to approve and it only takes a minute. The invoices are approved the same day that we receive them.” Even more amazing, Johnson noted how this takes place “within hours of the vendor emailing the invoice.”

“We really felt that docSTAR was here to help us out and that they understood what we needed – they delivered on that.” ~Denise Johnson

Improved Accountability: Another byproduct of the streamlined approval process is how CCA is able to have far less communication about things getting lost because (a) all the documents are available in the system and (b) document accessibility is tracked. Documents are never lost and this prevents unproductive workplace bickering. “You’re not sitting here saying, ‘I didn’t do it, and you didn’t do it, so where is it?’” explained Johnson. This increased accountability speeds up the workflow and allows people to move on to more serious things that increase revenue.

Reduced Printing Costs: As mentioned before, integrating docSTAR allowed CCA to transition from paper to electronic documents, so the costs associated with paper trails have been significantly reduced. Johnson was unable to provide hard percentages of cost reduction because she feels they haven’t been using the software long enough to say with certainty how much less paper they have been ordering. However, the

reduction is certainly tangible: “I can tell you for sure that we are printing less paper,” commented Johnson.

She also sees an unexpected benefit from the drastic reduction in printing: “Not only are we printing less, but we have contacted a portion of our regular vendors to tell them not to mail us invoices any more. What they are doing now is emailing them to us and we are putting them into docSTAR so it’s not just us realizing savings, but our vendors are printing less and saving on postage.” This unexpected saving can only serve to strengthen the client to vendor relationship and the docSTAR software is definitely the driving cause.

Early Pay Discounts for Accounts Payable: CCA is experiencing another improvement in their vendor relationships; as invoices are being approved more quickly, payment is rendered in less time than before. In fact, CCA is now able to take advantage of early payment discounts that were previously unattainable. “We were able to obtain a 2% quick pay discount on one of our larger medical supply vendors,” Johnson relayed, detailing that this is one of the largest accounts payable they have. As these savings trickle through more invoices, large and small, CCA will continuously improve their vendor relationships and their bottom line.

A Future of Continued docSTAR Expansion

Johnson was honest about the minor setbacks they experienced while transitioning to digital document management, but she emphasized that docSTAR provided quality without compromise: “We had a very good feel [about docSTAR]. We really felt that these guys were here to help us out and that they understood what we needed – they delivered on that.”

After leveraging the time savings and improved efficiency, Johnson adds that the staff, too, is impressed. “The managers that use it, love it. We’ve gotten a lot of positive feedback about it.” Now, Johnson and other management executives look forward to further incremental return as they continue expansion of the docSTAR solution into other segments of CCA.