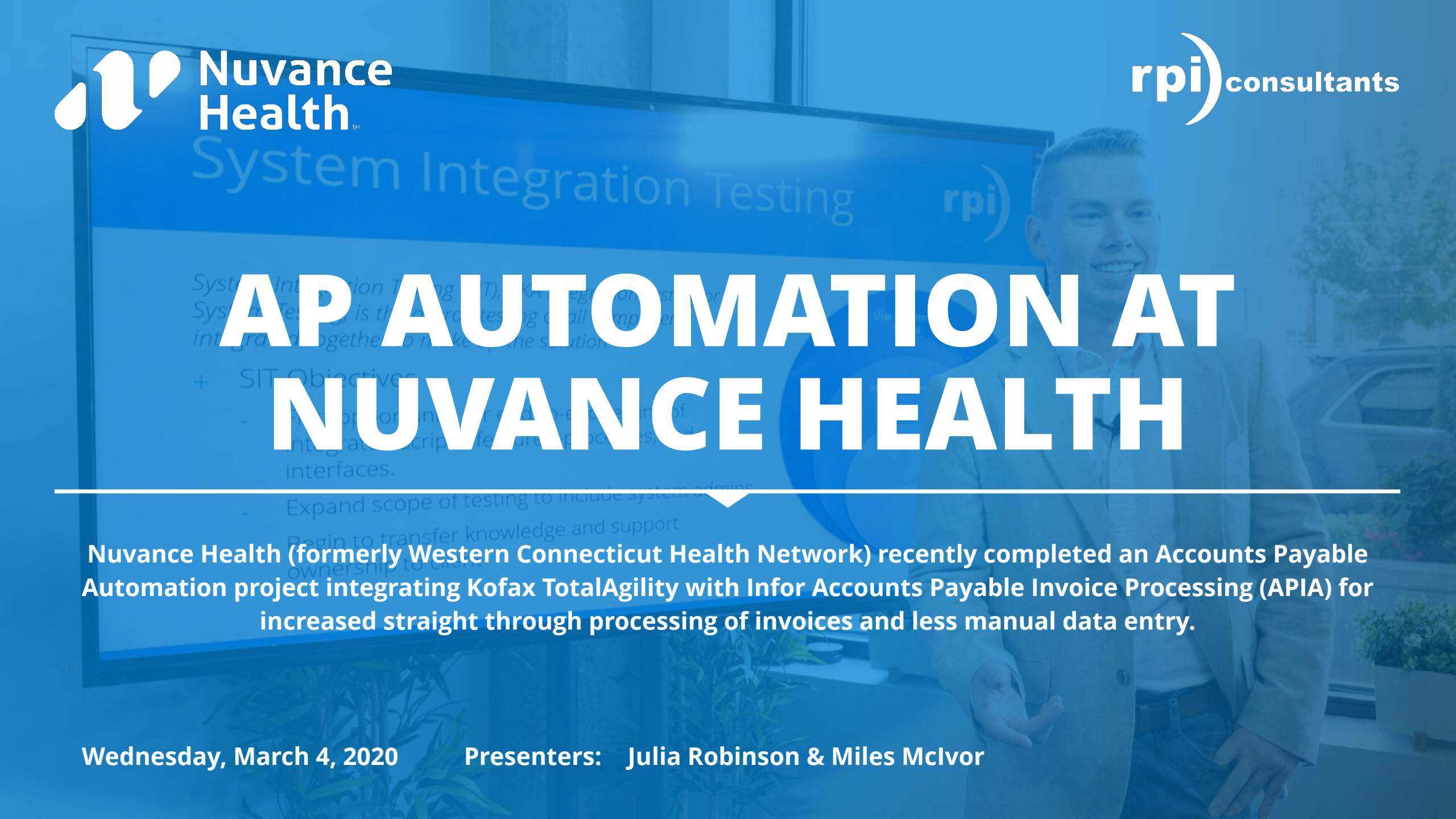


AP AUTOMATION AT NUVANCE HEALTH

Nuvance Health (formerly Western Connecticut Health Network) recently completed an Accounts Payable Automation project integrating Kofax TotalAgility with Infor Accounts Payable Invoice Processing (APIA) for increased straight through processing of invoices and less manual data entry.

Wednesday, March 4, 2020 **Presenters: Julia Robinson & Miles McIvor**

MEET THE SPEAKER

Julia Robinson

Senior Project Manager, RPI Consultants

+ Project Manager for 10+ years
+ RPI Senior Project Manager for 2 years
+ Master of Karaoke

MEET YOUR SPEAKER

Miles McIvor

Accounting Systems Manager, Nuvance Health

+ Professional Consulting Services background
+ 10+ Years in IT/Finance
+ International Rugby Superstar

AGENDA

+ About Nuvance Health
+ Challenge: Automate Invoice Processing
+ Solution: Kofax TotalAgility with Infor APIA
+ Outcomes, Metrics, & Results
+ Summary & Questions

ABOUT NUVANCE HEALTH

Nuvance Health, formerly Western Connecticut Health Network, is a not-for-profit health system in New York State's Mid-Hudson Valley region and western Connecticut. Nuvance Health was created by the merging of Health Quest and Western Connecticut Health Network and employs approximately 2600 doctors and 12,000 professional staff.

ABOUT NUVANCE HEALTH

+ **Non-Profit Health System**
  - Serving NY Mid-Hudson Valley and Western CT
  - Merger with Western Connecticut Health Network
  - Employs 2,600 Doctors, 12,000 Staff
+ **Enterprise Technology Investments**
  - Cerner EMR, Infor Cloud Hosted V10, Perceptive Content
+ **Accounts Payable Department**
  - 8 AP Staff
  - 192,000 Annual Invoices

Nuvance Health

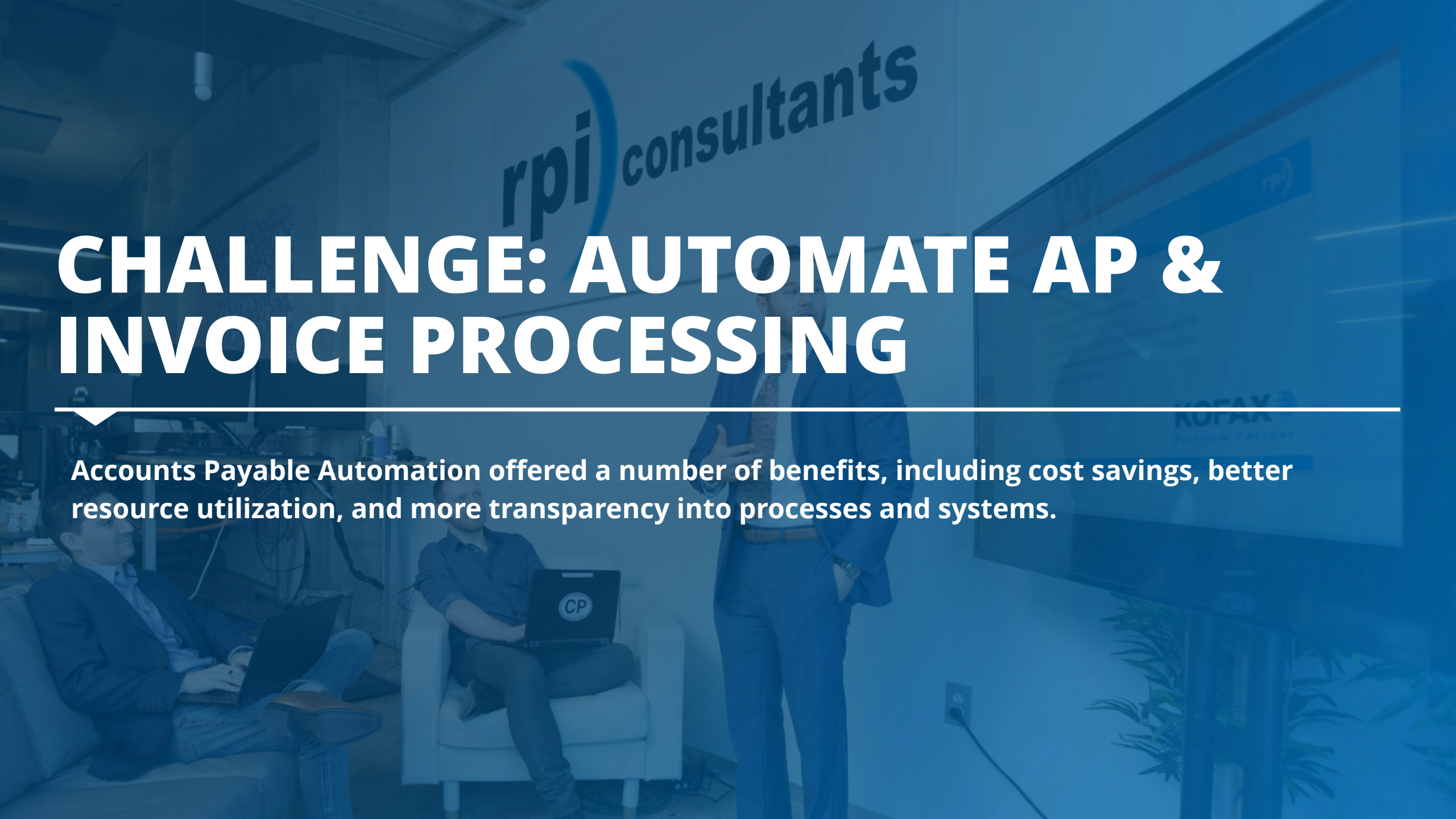
WHERE IT ALL STARTED

+ **Infor Procure-to-Pay Assessment**
  - Accounts Payable
  - Cash Ledger
  - Infrastructure
  - IPA
  - Matching
  - Requisitions
  - Inventory Control

WHAT WE FOUND

WHAT WE FOUND

+ Six (6) Foot Stacks of Paper
+ Full Fiscal Year of Invoices in Filing Cabinets
+ 30-45-day Invoice Processing Timeline
+ Overall AP "Black Hole"
+ Invoice Approvals by Email
+ Invoices Processed by Alpha Sort



CHALLENGE: AUTOMATE AP & INVOICE PROCESSING

Accounts Payable Automation offered a number of benefits, including cost savings, better resource utilization, and more transparency into processes and systems.

OBJECTIVES

OBJECTIVES

+ Digitize and Automate Accounts Payable
+ Process Consistency and Documentation
+ Reduce Paper Storage & Processing
+ Improve Straight-Through Processing of Invoices
+ Reduce Errors & Delays
+ Consolidate & Automate Vendor Maintenance

EXISTING TECHNOLOGY & STAFF

+ **Infor Version 10**
  - Manual Input Processing of physical invoices
+ **Accounts Payable Staff**
  - Eight (8) AP Processors/Clerks, One (1) Mail Clerk
+ **Repurpose Other Roles to Improve Business Efficiency**
  - Vendor Maintenance
  - Employee reimbursements
  - Reconciliation
  - Research and Payments

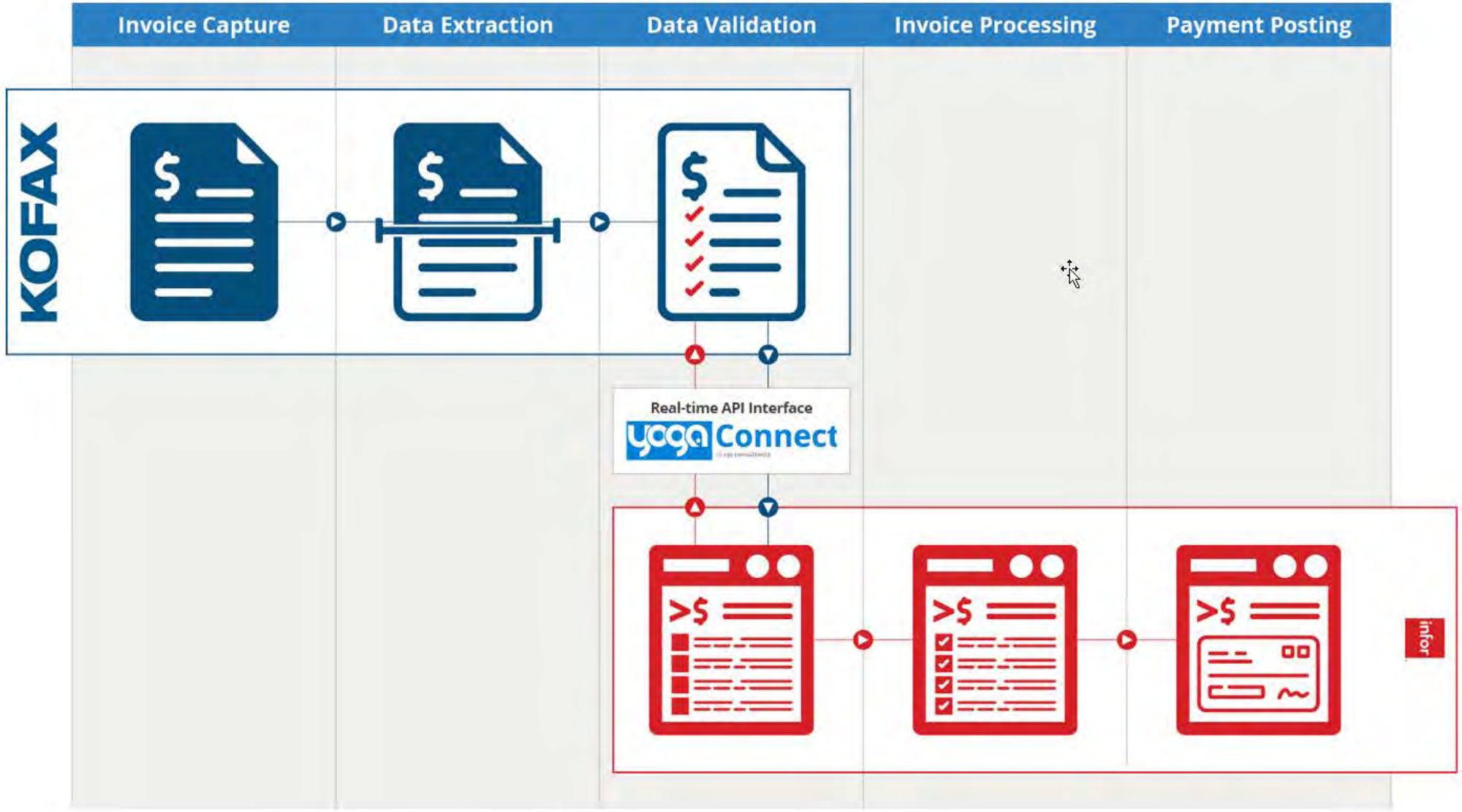
NUVANCE REQUIREMENTS

+ Imaging (OCR and Repository)
+ Advanced Data Capture
+ Approval Workflow
+ Reporting, Metrics, and Dashboard
+ Training Documentation
+ Vendor Master Cleanup

SOLUTION: KOFAX TOTALAGILITY WITH INFOR APIA

RPI Consultants proposed and delivered an Accounts Payable and Invoice Processing Solution utilizing Kofax's TotalAgility platform for invoice capture, data extraction, and data validation, integrated with Infor's APIA for invoice processing and approvals.

SOLUTION OVERVIEW



KOFAX TOTALAGILITY

+ **Capture Emailed and Scanned Documents**
  - Invoices
+ **OCR Email and Scan of PO and Non-PO invoices, Statements, and Credit Memos**
+ **Data Extraction by Document Type**
+ **Data Validation against Infor**
+ **Automated Approver Routing**
+ **Buyer Queues**
+ **Vendor Maintenance Queues**

INFOR APIA

+ Customized HR Structure For Routing
+ Processing of Invoices, Credit Memos, and Utilities
+ Exception Process For Manual Resolution
+ Interface With Infor ERP for Payment Posting
+ Manager Notifications

PROJECT PLAN & IMPLEMENTATION

+ **Timeline March – October 2019**
  - End of Fiscal Year 1 October – Hard Deadline
+ **Professional Services In Scope**
  - Process Analysis and Solution Design
  - Software Implementation and Custom Development
  - Multiple Training Cycles
  - Onsite Training
  - Onsite Go-Live Support
  - Post Go-Live Stabilization
+ **Hardware Considerations**
  - Scanners, servers, workstations

OUTCOMES & METRICS

After 6 months post-Go-Live, this is an overview of where we are today.

OUTCOMES

OUTCOMES

+ **Invoice Processing numbers**
  - 5 days for all invoice Types
  - 2 days for PO Invoices
+ **Full Visibility On Tracking Invoices End-To-End**
+ **Manual Input vs. Automated Validation**
+ **40% Down To 20% Physical Mail Scanning/Processing**
+ **Early Pay Discounts**
+ **Repurposing AP Staff To Other Roles**

PROJECT LESSONS LEARNED

+ **Radical Transparency & Over Communication**
+ **Manage Expectations**
+ **Assign a Change Manager**
+ **Stakeholder Buy In for Go-Live**
+ **Post Go Live Support**

SUMMARY & QUESTION

Nuvance Health (formerly Western Connecticut Health Network) recently completed an Accounts Payable Automation project integrating Kofax TotalAgility with Infor Accounts Payable Invoice Processing (APIA) for increased straight through processing of invoices and less manual data entry-.

SUMMARY & QUESTIONS

+ **About Nuvance Health**
  - 8 AP Processors
  - 15,000 invoices monthly
+ **Challenge: Automate Invoice Processing**
  - Reduce manual invoice processing
  - Decrease timeline to process invoices and payments
+ **Solution: Kofax TotalAgility with Infor APIA**
  - Intelligent Data Capture for Extraction & Validation
  - APIA for Invoice Processing & Approvals
+ **Outcomes, Metrics, & Results**
  - 45 day to 5 day Invoice Processing

Nuvance Health

GETTING STARTED WITH AP AUTOMATION

+ **Accounts Payable Assessment / Scorecard**
  - Evaluate and measure current invoice processing efficiency
  - Inventory current technology investments and un-used potential
  - Identify opportunities for processing improvement and ROI
+ **Requests for Proposal**
  - Evaluate multiple vendors and solutions for AP Automation
+ **Contact RPI Consultants for Demo**
  - Will customize to your ERP and environment

PRODUCT & SERVICE CAPABILITIES

+ **Infor (Lawson) CloudSuite**
  - Full service Infor professional services and consulting
+ **Hyland**
  - ERP Agnostic Enterprise Content Management Solutions
  - OnBase, Perceptive Content, Brainware
+ **Kofax**
  - ERP Agnostic Content and Process Automation Solutions
  - Kofax Capture, Transformation, TotalAgility, RPA, and ReadSoft Online

ABOUT RPI CONSULTANTS

+ **100+ Full-time Consultants**
  - Including Project Managers & Architects
+ **Based in Baltimore, MD**
  - Additional offices in Tampa, FL, and Kansas City, MO
+ **Technical & Professional Services**
  - Technical Strategy & Architecture
  - New Installations, Upgrades, & Migrations
  - Process Analysis, System Design, Implementation
  - Managed Services & Staff Augmentation
  - Project & Change Management

infor Alliance Partner CloudSuite™ Specialized

KOFAX Platinum Partner

Hyland Authorised Solution Provider

Product / Vendor Partnerships