

Case Study

Advanced Imaging Solutions helps Allied Physicians of Michiana pay bills with less paper

Challenges

- Proliferation of paper documents
- Cumbersome workflow
- Need to integrate document management solution with existing accounting software

Allied Physicians of Michiana (APOM) represents an exciting new approach with value for patients and physicians. It's a management services organization that encompasses 10 medical practices—the objective of APOM is to combine the business operations of multiple physicians in several group practices of varying size and specialty into a single, efficient company. The result has been that the physicians involved can continue to devote their time and talents to patient care.

One of APOM's responsibilities is the management of accounts payable for the practice members of the group. The accounts payable staff receives 350+ invoices monthly from the group members. The typical path of an invoice is as follows: The invoice is received at a medical office. The invoice is reviewed and copied, the original is filed at the medical office and the copy is sent by courier to APOM. APOM receives the courier envelope, processes the invoice for payment, copies it and includes the copy with payment, if required by the vendor. After payment, the invoice is archived for two years at APOM and then moved to a storage facility to be kept for another five years. By the time the invoice is stored, it has been handled by at least six people and duplicated at least once. Occasionally, an invoice doesn't make this journey at all; a few invoices have been lost during the trip from the medical office to APOM.

When the CEO of Allied Physicians of Michiana expressed an interest in reducing the amount of paper in the AP workflow, Bruce Jones of Pinnacle Group of Indiana contacted Advanced Imaging Solutions for a document management software solution that would integrate with APOM's Dynamics GP software—Dynamics GP was customized and installed for APOM by the Pinnacle Group.

Solutions

- Fortis™ document management software by Westbrook Technologies
- Customized image-enabling software link to accounting program
- Program multifunction products (MFPs) for easy scanning and integration with Fortis™

After consulting with the Pinnacle Group and reviewing APOM's accounting and workflow processes, Advanced Imaging Solutions recommended Fortis™ document management software. Fortis is a powerful document management software that electronically captures, stores, and organizes documents and business information, thus providing immediate and reliable access to crucial information right when it's needed. Due to the ability of Fortis to seamlessly link to other mission-critical software, the Pinnacle Group was able to program Dynamics GP to integrate with Fortis' image enablement function, thereby meeting the criteria for a link between the transaction records in the accounting program and the scanned invoices in Fortis. The accounts payable staff could now simply identify data while in Dynamics GP, click a button, and Fortis presents the associated documents.

After installing Fortis, Advanced Imaging Solutions provided two 1/2 days of training on Fortis and the interactive between it and Dynamic GP. "Training by Advanced Imaging Solutions was great. Fortis is very user-friendly and the instructor was thorough and knowledgeable. The instructor made training interesting," said Carol Kurzhal, APOM's Accounting Manager. Advanced Imaging Solutions also programmed the accounting department's multifunction products so that documents could be scanned at the MFPs and sent directly to the AP staff's computers.

"It was our management team that initiated the search for a way to reduce paper usage in Accounts Payable but my staff has quickly embraced digital document management. We see more and more potential for its capabilities in our department and our medical practices."

— Carol Kurzhal
Accounting Manager
Allied Physicians of Michiana

Results

- Less paper usage
- Simplified work process
- Smooth integration between document management and accounting software

Kurzhal's staff is no longer shuffling through reams of invoices. Invoices are scanned and sent to the appropriate digital folder and from that point on, the information can be immediately retrieved with no time-consuming paper searches. Plus, invoices can now be easily shared as Adobe PDFs or as Fortis documents and distributed via email, fax, CD, network, or printed copy. Eventually, APOM will be able to do away with their outside storage facility and will maintain digital archives. While the Fortis solution has already had a positive impact for the Accounts Payable staff, further reductions in time spent handling paper are coming. "Initially, we are scanning into our MFPs the invoices sent to us from the practices. However, each practice will soon scan and email us their invoices," said Kurzhal. The next step will be to encourage vendors to invoice in PDF format and further reduce scan time and paper usage.

The image enabling link between the two programs has been key to the success of the digital document management process. Without this link, the AP staff would have had the benefit of the security and accessibility of digital documents but the invoice processing would still have been cumbersome—they would have to open, login to and navigate two software programs to find all the information needed about a transaction. Now an AP processor simply identifies the data in Dynamics GP, presses a "hot key" and Fortis presents the associated document.

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Advanced Imaging Solutions
1-800-332-6793

- South Bend
- Merrillville
- Fort Wayne
- Grand Rapids

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