CUSTOMER CASE STUDY

CLIENT OVERVIEW

Penn Medicine is one of the world's leading academic medical centers, dedicated to the related missions of medical education, biomedical research, and excellence in patient care. Penn Medicine consists of the Raymond and Ruth Perelman School of Medicine at the University of Pennsylvania (founded in 1765 as the nation's first medical school) and the University of Pennsylvania Health System, which together form a $4.3 billion enterprise.

The Perelman School of Medicine is currently ranked #2 in *U.S. News & World Report's* survey of research-oriented medical schools. The School is consistently among the nation's top recipients of funding from the National Institutes of Health, with $479.3 million awarded in the 2011 fiscal year.

The University of Pennsylvania Health System's patient care facilities include: The Hospital of the University of Pennsylvania - recognized as one of the nation's top "Honor Roll" hospitals by *U.S. News & World Report*; Penn Presbyterian Medical Center; and Pennsylvania Hospital — the nation's first hospital, founded in 1751. Penn Medicine also includes additional patient care facilities and services throughout the Philadelphia region.

THE CHALLENGE

The University of Pennsylvania Health System required assistance to better automate business processes which are unique to their environment. Methods employed were not meeting their needs and had become costly. The University of Pennsylvania Health System needed to reduce error rate, increase productivity, focus staff on more strategic projects and improve exception processing working towards a paperless and highly auditable environment.

> *"We had an outsourced imaging solution that included several file transfers each day. The process had become antiquated and costly."*
>
> - **Stephan W. Kelly**, **Director of Disbursements - University of Pennsylvania Health System**

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THE CHALLENGE – CONTINUED

The University of Pennsylvania Health System faced several specific challenges:

- They were using a software solution that did not provide a rich environment for automating business - the outsourced vendor opened, sorted, scanned and indexed their purchase order related invoices. Check request forms were scanned after payments. The process lacked an audit trail and provided no workflow.
- Workflow needed to be re-vamped to achieve operational efficiencies through fewer touches. Productivity needed to be improved.
- Easier navigation through a user-friendly solution set was required.
- Real-time integration with Lawson was needed.
- A less than robust imaging system was being used that did not allow for easy retrieval or review of data.
- It was a constant struggle to match invoices to POs due to inadequacies in their technology and business processes.
- They required better reporting and improved exception processing.
- A paperless environment was highly desirable for efficiency purposes (highly auditable).

THE SELECTION PROCESS

In August 2011, The University of Pennsylvania Health System began the selection process. During an 18 month period, they researched different technology options and evaluated vendor solutions. This time period included vendor demonstrations, selection, legal agreements, scope, development, testing and finally implementation.

During this selection process, they thoroughly evaluated Ascend Software in addition to three other leading solution providers over a six-month period. Although The University of Pennsylvania Health System initially considered a current partner who provides document management software in a non Finance area, they eventually returned to Ascend Software solutions for the following reasons:

- Ascend's SmartTouch AP™ captures invoices and supporting documents through standard and advanced capture methods. Advanced document data recognition features are used and their OCR technology was particularly appealing to the University.
- Ascend's SmartTouch AP Automation and the intelligent data capture solution helped with process improvement, reduced costs and promoted green initiatives.

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THE SELECTION PROCESS – **CONTINUED**

- Ascend Software's SmartTouch A/P Imaging and WorkFlow solution streamlined the accounts payable processing through automation and imaging to reduce manual processing. The workflow solution from Ascend allowed the University staff to better allocate their time and become more productive.
- Workflow incorporates into the staff's daily activities and automates both routine and infrequent tasks, and easily automates labor intensive research, tedious document collation, benefits calculations, and approval routings and escalations.
- The expertise of Ascend resources regarding Accounts Payable was superior and unmatched.

> *"Our favorite features of Ascend Software's solutions are the combination of scanning and image control and OCR, followed by the workflow which allows us to track items and force accountability."*
> - **Stephan W. Kelly**, **Director of Disbursements - University of Pennsylvania Health System**

THE SOLUTIONS – SmartTouch AP Solution – scanning, analytical OCR capture, RS Advanced Workflow, RS Image Manager, and Ascend's ECM

Ascend Software's solutions delivered the following benefits and capabilities to The University of Pennsylvania Health System:

- Actual monthly costs were reduced.
- Process is much more sound - by bringing in the scanning and indexing of the documents in-house, they have reduced errors and error resolution.
- Ascend's process flow and tracking solution have enabled The University of Pennsylvania Health System to route requests electronically. These solutions also allow them to track employee and approver performance.
- Since the Ascend solution integrate with their ERP, Lawson, in real-time, they can now capture invoices two days faster than under the former model. This has increased their ability to resolve discrepant invoices sooner.

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THE SOLUTIONS – CONTINUED

- AP days have increased. They have expanded their solution to also track discrepant manual check requests and those invoices that cannot be added to Lawson. Therefore the process runs much smoother and efficiently.
- The Ascend team helped the AP Department streamline most facets of their operations. The Ascend solution is very flexible. It was not customized to meet their needs, but rather configured to their needs.

Ascend is now actively being considered beyond the AP & HR departments as a potential solution to automate workflows/reporting throughout the University."

- **Stephan W. Kelly**, **Director of Disbursements - University of Pennsylvania Health System**

About Ascend Software

Since 1997, Ascend Software has developed business process management solutions which provide greater cost savings automation and faster implementation. Ascend's enterprise content management solution was designed from the ground up to archive all types of information (i.e., documents, reports, images and all file types) and in their native format. Additionally, Ascend developed their advanced business automation platform that provides greater automation and is the foundation for their SmartTouch Solutions. Ascend's advanced automation overcomes challenges typically found in workflow solutions and is the reason for their implementation success. Ascend's solutions are implemented in all industries and distributed in fourteen countries. Offices are in California, Nevada, Tennessee, Oregon, Florida and Indiana. Visit http://www.ascendsoftware.com for more information.

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