## MULTIPLAN SELECTS PROCESS DIRECTOR TO AUTOMATE CAPEX AND OTHER KEY PROCESSES

Founded in 1980, MultiPlan is the nation's leading comprehensive provider of healthcare cost management solutions. The company contracts with almost 900,000 healthcare providers and has an estimated 57 million consumers accessing its products. The company also provides a single gateway to a host of primary, complementary and out-of-network strategies for managing the financial risks associated with healthcare claims.

MultiPlan delivers its transaction-based services to insurers/health plans, third party administrators, HMOs, self-funded employers and other entities that pay medical bills in the commercial healthcare, government, workers compensation and auto markets. The company processes more than 40 million medical claims annually. In addition to offering regional PPO networks in Wisconsin and the southwest, MultiPlan is the only company to offer access to independent national primary PPOs—as well as its network, negotiation and medical reimbursement services—through a single electronic submission.
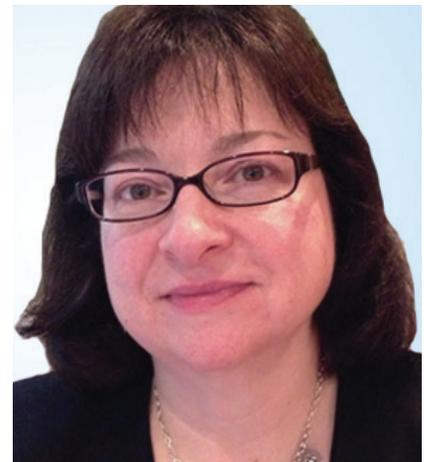
Lisa Campbell-Chau
IT Contracts Manager

MultiPlan is owned by BC Partners, a leading international private equity firm, and Silver Lake, the world's largest private investor in technology.
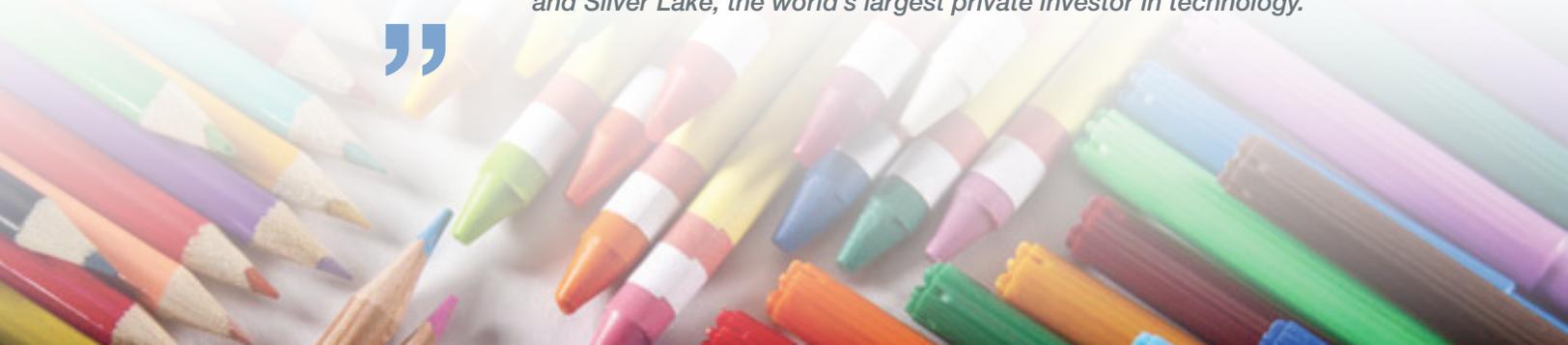
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FINDING AN OFF-THE-SHELF PRODUCT

As a company focused on quality and efficiency in all aspects of its business, MultiPlan's management recognized a need for a more effective method of handling its capital and major expenditure requests. The application being used resided on a Lotus Notes database – and MultiPlan wanted to retire that database. Replacing its proprietary Capital Expenditure (CapEx) application with an eProcurement solution was the course MultiPlan 'expected' to pursue.

Working with users in Finance and Facilities, the IT group formed a team to review potential solutions. Beginning with Google searches, the group began to look at a number of vendors, primarily eProcurement – as well as some analytics vendors. They identified 17 companies, quickly discovering that the canned solutions they reviewed on the eProcurement side were overkill for what MultiPlan needed to accomplish.

"We were hoping there was something off-the-shelf that would embrace the business processes underlying both capital and major expenditures, along with an electronic approval process– and would integrate with MultiPlan's financial management, ERP and other packaged applications," stated Lisa Campbell-Chau, IT Contracts Manager. Working with Beth Kaplan, Senior Operations Analyst in MultiPlan's Finance department, Campbell-Chau decided to look at both hosted and on-premise solutions.

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A SOLUTION FOR BUSINESS USERS

Both IT and Finance recognized the need to automate and provide more visibility into the company's Capital (CapEx) and Major Expenditure (MER) processes, as well as integrating with its financial management software. Narrowing the search to five vendors, Finance provided templates as to how the application looked in Lotus Notes. The group identified the criteria for a tool that would incorporate workflow, business logic, and reporting – then invited three vendors to do deep dive demos.

As a result of those demos, and with the backing of the Finance department, MultiPlan selected BP Logix. According to Kaplan, "BP Logix was the only company whose demo reflected what we provided in the template. The end users in Finance were comfortable with Process Director since its look-and-feel mirrored what they knew and were using."

Process Director/Cloud Edition enables business users to review historical and current data related to business processes, understand the implication of activities in running processes and

to instantly implement corrective action to overcome a pending problem, if one is present. Process Director/Cloud Edition fuses traditional workflow automation with the BP Logix Process Timeline™. As a result, it enables process builders to specify dependencies and conditions, determine the planned duration of a process, and define the order for all activities within the process.

Delivering on the promise of rapid deployment and cost savings, while also providing process improvements and automation, MultiPlan entered into a Proof of Concept (POC) with Process Director/ Cloud Edition. Over the course of three months, Campbell-Chau and Kaplan, along with the project team, worked collaboratively to ensure that the software would address both Finance and IT's concerns. Based on the success of the POC, MultiPlan selected Process Director to automate and manage its processes.

THE IT PERSPECTIVE

While the evaluation team looked at both hosted and on-premise solutions, the preference (and MultiPlan's company direction), was to procure a Cloud solution – but to have the ability to bring the product in–house if subsequently desired. IT also had a second phase in mind, integrating the product with Microsoft Dynamics GP (formerly Great Plains), its General Ledger software. The team believed that Process Director could accommodate that better than the competitive products it had evaluated.

Some of the features that IT appreciated in Process Director included: 1) The ability to export to Excel,   2) That the templates provided appeared to be easy to develop and change, 3) Minimal training was required, 4) There was a mobile module available for frequent travelers, and 5) The system could remind someone at a specific time that there was a task in his or her queue.

"As an IT support group, we work closely with our business users to ensure that the technology they select will address both short and longer term needs," stated Campbell-Chau. "We hoped that an off-the-shelf product would address both our processes and workflows. The decision to select Process Director/Cloud Edition was made by Finance with guidance from our group. We were pleased with the selection as were the business users," she remarked.

A PLEASANT SURPRISE

Within the first month, MultiPlan realized how much more Process Director could do than initially anticipated and decided to expand its usage to include automated PO generation – as well as creating separate workflows for its Software Project Authorization process. While Finance expected to deal with large capital expenditures, IT found it could use Process Director for every expense (capital and operating expense) process. Additionally IT discovered the team could build whatever it needed from the ground up in Process Director.

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Campbell-Chau liked the ability to attach however much documentation was needed to the respective processes. This included vendor quotes, ROI analysis etc. When IT added Accounts Payable (AP) as users in Process Director she heard how much AP appreciated being able to search, pull Purchase Orders and match invoices within the system. Since Accounts Payable's process start with entering invoices into Doc-Link (MultiPlan's document management system used for both AP invoice approval and document image storage) having Process Director import the POs into Doc-Link and ultimately export them into Microsoft Dynamics GP will save time and make the process more efficient.

"We thought about how our auditors would find an asset purchased on a specific date three years ago – and began looking at our Asset Disposal and Software Project Authorization as part of the initial rollout," observed Campbell-Chau. "Now our auditors can go into the portal, see the request and the supporting documentation (vendor quotes, ROIs, who approved, questions related to its priority – the entire conversation). It helped us put controls in place that were needed. Now any purchase over $50,000 must have a ROI analysis. We simply created a different workflow based on the dollar amount so that it routes based on our internal controls," she remarked.

Once the initial process was developed a three systems admin staff were trained in less than one hour. A week later Campbell-Chau trained 20 users in a couple of one- hour sessions based on department. (Facilities, Finance, IT etc.)

AN EASY, STRAIGHTFORWARD IMPLEMENTATION

MultiPlan's initial process went live in January 2012. According to Campbell-Chau, "Day One we were running with no problems." Nine months later MultiPlan had developed its Asset Disposal, Transfer and Sale process. Finance created the templates and

a log that indicated whether an asset had been disposed of, transferred, sold, when it was depreciated etc. Finance now receives the electronic form and compares the information to the asset and depreciation schedules.

While Process Director was originally going to be used primarily for CapEx and major expenditures, it is now being used for all hardware, software and maintenance acquisiton processes. The product's ease of use and familiar look-and-feel have enabled business users to embrace the solution quickly. As users were being trained they told IT how clean the product was, how easy it was to look at and how friendly it was to use.

A SIGNIFICANT REDUCTION IN TIME

Process Director provides the bells and whistles that MultiPlan needed to make its processes work efficiently. Always knowing where a task is in its complex approval queue is important to both IT and Finance. The workflows go across multiple departments smoothly and operate seamlessly.

According to Campbell-Chau, "I do a lot of reporting on all major expenditures and Purchase Orders. I use Process Director to show me how we are performing against our forecast – and can use it to reforecast if necessary. Finance does monthly reports as well – and we have to reconcile our reports. That effort is significantly easier and faster due to having Process Director."

MultiPlan has also reduced the amount of time it takes to purchase items, and no longer relies on email. "One of the fastest approvals we have ever had involved three people and was done in less than five minutes," recalled Campbell-Chau.

According to Kyle Hutchinson, Vice President Information Technology at MultiPlan, "Process Director has significantly increased our turnaround time for obtaining approvals and delivering orders to our vendors. It has also enabled us to have a single repository for tracking of disposed, sold or transferred assets. The underlying automated workflow allows us to engage our internal operations faster and capture relevant information that can be viewed by all in the approval workflow. We were very pleased with the efficiencies achieved from the very beginning of the Process Director deployment."

THE BOTTOM LINE

As a managed care organization, MultiPlan has a lot of data. The company continues to look for opportunities to use Cloud technology when appropriate. In the case of Process Director, IT liked the idea of running in the Cloud, as it is always looking for ways to reduce its own footprint.

While Campbell-Chau appreciates Process Director's acceptance across MultiPlan she also continues to look for new opportunities to expand usage. "Process Director is simple to use – and everyone is excited about using it. Next month is our big audit. We know we are better prepared for it – and will be even more so in 2014," she concluded.

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