How West Harbor Healthcare Spends Less Time On Invoices and More on What Matters Most with Ottimate

When West Harbor Healthcare found themselves in need of a new Accounts Payable (AP) solution, Ottimate was there to make invoice automation easy — and provide several other unexpected benefits.

West Harbor Healthcare:
Excellence Through Exceptional Care

Built on a foundation of love, respect, and a dedication to exceptional patient care, West Harbor Healthcare is a regional care center that owns and operates eight skilled nursing facilities throughout California.

While residents and their families remain at the forefront of their work, smooth operational practices are also key drivers of West Harbor's success. Like many healthcare facilities, West Harbor relies on accurate payments reporting, especially when it comes to fiscal accountability and a streamlined accounts payable (AP) process.

Incorrect or missing information can create obstacles in receiving critical government support for costly pharmaceuticals, medical supplies, and payroll for top-notch caregivers and medical professionals.

The Challenge

As their AP processes experienced a significant slowdown, Mary and the West Harbor team decided it was time for a change. They set out to find a new, more streamlined invoicing system.

West Harbor first turned to Stampli, but the onboarding process revealed that Stampli's services didn't quite meet their needs.

As they considered exploring other AP solutions, a well-timed call from Ottimate helped steer them in a new direction.

West Harbor Healthcare

~1,200
Invoices processed each month

Sage
ERP of choice

Eight
Locations throughout California

The Solution

From the beginning, West Harbor could see that Ottimate's Invoice Automation solution was the right fit for their needs.

"[Onboarding] was super smooth," reflects Mary. "It was a matter of quickly showing me how to set up the users, how to set up the approval rules, and then we were off to the races. It's just been really easy and simple to use."

With Ottimate, Mary and her team have been able to streamline West Harbor's AP workflow — saving a lot of time in the process.

According to Mary:

> **"We're not spending a lot of time on every single invoice, having to code every single line item. Before, I was probably spending 15 to 20 hours a week just trying to get things to work right. And now, I go in every morning or afternoon for about half an hour to 45 minutes. So it's definitely cut a lot of my time out there!"**

Do More With Less

West Harbor previously used Yooz for their AP needs, which served them well for several years. But a change in the platform didn't align with West Harbor's workflow, increasing the time Accounting Manager Mary Herrington and site-level AP assistants spent uploading and coding invoices each week.

By Ottimating their processes West Harbor is able to get more done, with less manual work!

The Results of Ottimate

Other benefits have emerged since Mary and the West Harbor team began their AP automation journey with Ottimate, from helping create more accurate financial statements to making it easier to submit quarterly government reports.

The "Create Invoice" Feature Makes Short Work of Long Invoices

The ability to create invoices directly from the Ottimate platform has made processing lengthy pharmacy invoices more efficient.

> **"In healthcare, we have monthly pharmacy bills, and those invoices can be 160 pages. It would take a really long time to upload those. So, I use [the create invoice feature] when we get those bills. There's really only four GL codes we're going to use for an invoice that size, so we figure it out ahead of time and upload it manually."**

This feature has also made it easier to process payroll for contract employees. "A lot of our CNAs and LVNs are outsourced, and those invoices come over to us, line by line, with each person in each shift. So we consolidate those with 'create invoice.' Once you get used to using that feature, it's just a couple minutes of uploading — it's much quicker than me having to manually enter it into [our ERP] Sage each time. I really do like that feature a lot."

Monthly and Quarterly Reporting Saves Time and Paper

Being able to review invoices before exporting information helps West Harbor keep its books clean and makes end-of-month accounting a breeze.

It also eases heavy government reporting workloads. Not only does West Harbor have to file annual cost reports with the Centers for Medicare & Medicaid Services (CMS) and the State of California in order to receive Medicare funding, but they're also required to submit a quarterly Payroll Benefits Journal to maintain their star rating with CMS — which are time-consuming and resource-heavy undertakings.

But now, they can view all the invoices they need right in the Ottimate platform and process them in real time, rather than scrambling to track and organize everything at the end of each quarter, saving time, hassle, and headaches.

Custom Approval Flows Keep the Process Moving

Setting custom approval flows enables Mary to track approvals easily. She always knows when it's time to contact designated approvers — and when it's time to follow up if an invoice hasn't been approved.
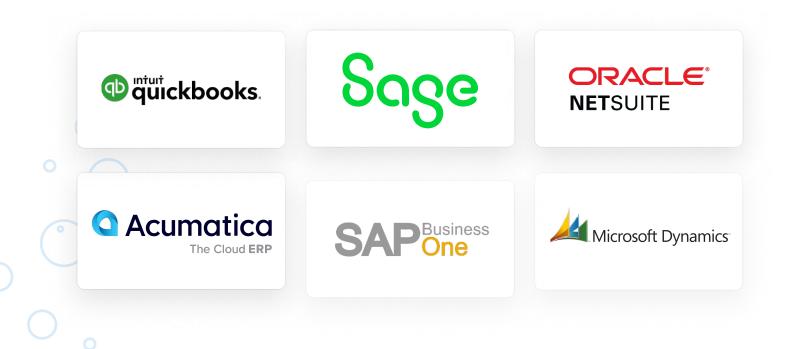
And if a primary approver isn't available, Mary can rely on Ottimate's stand-in approver function to keep things moving.

The Archive Makes Past Invoices Easily Accessible

Ottimate's archive feature is especially popular at West Harbor. Having invoices and notes centralized into a single system lets Mary and her team easily answer questions and quickly resolve any issues that may arise.

"We recently had a vendor reach out with a problem. And I just went in there and looked, and the invoices being disputed had been archived and all the notes were right there. I gave them the notes, told them who to talk to, and that was it. Before, if something like that happened, it could take a month to get it resolved. And now it's just a week or so, because we have the information right there."

Integrate With Leading ERPs

A Foundation for Success in Healthcare

With Ottimate up and running, manual invoice processing is a thing of the past for West Harbor Healthcare. Mary, in particular, can now focus more of her attention on other important aspects of her work. "I've taken on other tasks, including things that the controller has been doing," she excitedly shares.

And she'd happily recommend Ottimate to other facilities looking to automate their AP processes.

"I haven't had any problems using Ottimate," says Mary. "It works. It does what you guys have said it does, and we don't have any issues with it. It's easy to use, and I just think it's super efficient. I just really like it."