

Paperless Efficiency in the AP Process for Benefits Provider



Industry: Nonprofit/Healthcare

Location: Aurora, Illinois

Employees: 251 - 500

Invoices: 850/month

ERP: Sage Intacct

UNITE HERE HEALTH, based in Aurora, Ill., is a multi-employer Taft-Hartley Trust Fund governed by a Board of Trustees composed of union and employer representatives. Its mission is to provide health benefits that offer high-quality, affordable healthcare to its participants.

For several decades, UNITE HERE HEALTH has served UNITE HERE! union workers in the hospitality, food-service and gaming industries. UHH takes in contributions from restaurants, hotels and casinos based on their collective bargaining agreements with local unions and manages their employees' healthcare benefits.

"With Yooz, we know where documents are at all times. Before, it may have taken hours to find out just what the volumes were. People would come to my office to look for files or invoices. Now, I can find things quickly and run reports since I have easy access to all relevant documents."

Bryan Schmidt, Controller

⊗ Previous Pain Points

Document storage & access

Lack of visibility

Approval Bottlenecks

Time-consuming processing

✓ The Yooz Solution

➤ **Cloud-based 24/7 remote access.** Powerful search capability similar to leading search engines.

➤ **Transparent process;** full accountability for department manager.

➤ **Approval on the GO** thanks to Yooz Mobile application for faster processes.

➤ **Unlimited customizable workflows** with tailored approval levels.

⊗ The Challenge

UHH went live with Yooz in August 2016 at its headquarters in Aurora, which processes two-thirds of its monthly volume of 850 invoices. The second largest office in Las Vegas will follow suit expected sometime in 2017.

"It was the smoothest rollout I've ever experienced," recalls Schmidt. At the end of 2016, employees for the very last time boxed up paper invoices and have since switched to a paperless AP workflow. Invoices are either stamped with a special Yooz stamp and scanned into the cloud or submitted electronically.

The initial group of 60 users across the company quickly became familiar with Yooz and were eager to go paperless. *"I was worried about the cultural change of moving from filing paper to the cloud, but people immediately gravitated toward it and gave positive feedback,"* says Schmidt. The plan is to add another 10 to 20 users once Yooz goes live at the UHH office in Las Vegas.

The mobile interface has proven to be particularly beneficial since it lets the controller and other managers view and approve invoices from anywhere on their smartphone. Approving invoices on the road means fewer delays and speedier turnaround times. *"We now receive email reminders from Yooz and just have to click on a link to approve something. It's easier, faster and lets you see who has done what,"* says Schmidt.

✓ The Solution

With regional offices in large metro areas such as New York, Las Vegas and Chicago as well as other cities around the U.S., UNITE HERE HEALTH previously managed invoices manually, requiring labor and resources which were needed elsewhere. Regional offices were required to collect documents and send them to the office in Las Vegas or headquarters in Illinois for entry, proper coding, review and approval for payment. At the end of each year, boxes full of invoices had to be packed and shipped off-site for storage before new folders had to be created for the upcoming year.

In order to shorten cycle times, increase visibility and boost overall productivity, Bryan Schmidt, Controller, embarked on a *"lean initiative"* to go paperless and move the accounting workflow into the cloud. He went looking for a best-in-class AP solution that was easy to implement and did not require extensive training. He found the ideal vendor with Yooz.



The Impact

The partial rollout of Yooz has already resulted in a dramatic cut in AP cycle times. What used to take weeks now takes 4 days and has since further shrunk to currently 2.5 days. The improvements are due to capturing, automatically coding and storing invoices in the cloud instead of handling paper or sending around PDF files.

With these time savings come additional benefits that can be summarized as financial intelligence. As Yooz observes and learns from clerks' keystrokes, it can continuously improve GL coding, reducing errors.



Find out more about our integration with Sage Intacct