



# High Plains Rises Higher with ECM Toolbox AP Workflow



## CLIENT

High Plains Mental Health  
Center

## PROBLEM

Workflow inefficiencies  
were slowing business

## SOLUTION

AP Workflow for  
ApplicationXtender,  
ECM Toolbox Workflow  
with Batch Indexing,  
ECM Toolbox Eforms

## BENEFIT

Increased efficiency;  
cost savings; process con-  
trol improvements

## EXECUTIVE SUMMARY

High Plains Mental Health Center (HPMHC) is a comprehensive Community Mental Health Center with 20 branch and outreach offices throughout Northwest Kansas. HPMHC offers a full spectrum of services, including outpatient therapy, medication and psychiatry services, substance use disorder treatment, and community-based support services.

Quick response and continuum of care are at the heart of the organization. So when HPMHC management recognized a backlog of AP invoices disrupting workflow, they set out to streamline their AP department and improve the flow of their business.

They turned to CASO Document Management (CDM) for help transitioning to an automated workflow system that could increase efficiency, lower cost, and provide greater process control.

## THE SITUATION

HPMHC was manually processing its invoices and purchase orders at all branch offices. Invoices would arrive via email or hardcopy, and then manually routed to the correct individuals to be reviewed, approved and matched up with their respective purchase orders. They would often need to be recreated “post-invoice,” as the originals were either hard to locate or not created in their standard triplicate carbon copy format.

Invoices approved in  
hours instead of 10  
business days



750 documents  
processed per month



80 hours of labor  
eliminated per month



“ECM Toolbox Work-  
flow is everything we  
wanted and more. The  
first day we went live  
we immediately could  
see efficiencies and  
management of pro-  
cess and procedures.”

- Whitney Moeder  
Director of Support  
Services & Finance

Once the invoice was matched to a purchase order and approved, the information was manually updated in the ERP system, and the hard-copy invoice was filed away.

As a result, HPMHC system users and management faced growing inefficiency and a lack of visibility into the process. System users found it difficult to track down an invoice before it reached the last step of payment, while management could not forecast month end accruals. The effort to monitor the internal control and regulations was extensive because no reports could be run and audits required reviewing hardcopy paper. Finally, the COVID-19 pandemic made matters worse, as fewer individuals were coming into the office and Working From Anywhere (WFA) was becoming the norm.


Walter Hill, Executive Director of HPMHC, decided that the best path forward was to automate the invoice and purchase order process. “As a Not For Profit organization, we needed to find a solution that met our complicated needs, allowed the work to be completed in remote locations as quickly as possible, and was also a system that we could maintain and grow with our own resources,” Hill explains.

#### THE SOLUTION

CDM recommended adding ECM Toolbox Workflow and Eform software to HPMHC’s existing ApplicationXtender (AX) content management system. ECM Toolbox leverages AX to provides a powerful, user-friendly system that HPMHC could also administer itself.

ECM Toolbox drives efficiency in HPMHC’s AP Workflow and helps management oversee the process, enabling them to:

- **Enforce Company Policies** – by standardizing the process, which significantly reduces risk.
- **Eliminate Paper** – by immediately converting hardcopies to PDFs which are then routed to the correct parties for review and approval.
- **Track Documents** – with easy tools such as a Dashboard of outstanding work, Email notifications, and electronic record Tags that allow everyone to quickly track an invoice.
- **Empower Staff** – with workflows that are easily created and maintained by Business Users.
- **Automate Work** - through business rules logic that automatically deliver invoices to the correct party while checking for duplicates, correcting entries, and capturing user transactions.



**“This ended up being one of our best 2021 projects. We gained efficiency, auditable process control, and a platform to build upon for years to come.”**

- Walter Hill, Executive Director of HPMHC

“It was exciting to see HPMHC go from a manual AP process to a highly automated and efficient one,” noted Adam Fisk, Account Manager at CDM. “They rolled out their new AP Workflow and Eform capabilities to users with minimal training required. In fact, all 25 users were up and running within 30 minutes of being trained. They began designing and configuring their own workflows and Eforms before the first workflows even went into production.”

“This was a great project for me and for HPMHC,” explains Naomi Kitzi, Director of Data & Reports at HPMHC. “ECM Toolbox was easy to learn and quickly allowed me to empower my team. Perhaps most importantly, the system could be extended beyond our AP Department to help all departments across the organization. It is highly flexible and can be easily integrated into our other business applications. In fact, we are currently compiling a list of items to address in a Phase 2 implementation as we continue to evolve and align the system with our needs.”

Hill concludes, “This ended up being one of our best 2021 projects. We gained efficiency, auditable process control, and a platform to build upon for years to come.”

#### **ABOUT CASO DOCUMENT MANAGEMENT (CDM)**

CDM has been an innovator in developing practical, cost-effective imaging services and document management systems since 1994. With a management team totaling more than 100 years of experience, they have a proven track record with even the largest commercial and government requirements. CDM offers a full-range of imaging services or a comprehensive custom solution tailored to each company, industry or specific project. They support hundreds of regional and national clients in retail, finance, government, healthcare, education, construction, manufacturing and other sectors. To learn more about CASO Document Management (CDM), call 888.388.2276 or go to [www.caso.com](http://www.caso.com).