

Approvals by email – Courier helps Guadalupe Regional Medical Center streamline and track invoice sign-off

Background

The Accounting team at [Guadalupe Regional Medical Center](#) (GRMC) of Seguin, Texas was looking for a digital solution to improve their paper-based invoice processes. Their challenges were typical of organizations dealing with paper-based or uncontrolled document distribution. When sending paper invoices out for approval, they were going to the wrong mailbox, getting lost on someone's desk, or just not getting the approved document back. The approval process was complicated by the number of managers involved: the GRMC has forty managers who could be invoice approvers. The manual filing of these invoices and the lack of backup were a constant concern.

Why FileHold – the “Courier” feature

GRMC knew that software was available to move away from paper and into digital document management. They began searching for viable solutions using online web marketing. After reviewing options, GRMC short-listed several vendors. After eliminating others due to cost or unresponsiveness, FileHold was selected as providing the best value. FileHold has an unique capability solution called "[Courier](#)", that allows the GRMC to give secure access to documents to anyone who has an email address. Courier does not require the recipient to have a FileHold license, meaning a low transaction cost to use the feature.

The new AP business process

The FileHold Courier module proved the ideal solution. Courier allows the GRMC to give the appropriate approving manager access to invoices securely stored in the FileHold library via email. Once an invoice was added to the FileHold library, the Accounting team could use Courier to transmit a link to that document. This link is more secure than a traditional attachment as the sender maintains control over the document – it can be set to expire after a length of time, and automated reminders can be sent to make sure unapproved documents are addressed. Managers open their Courier transmission email and use their web browser to view and approve the invoice directly. Courier can require a password to access the document for added security. GRMC has received a very good response from the managers, as the emails include instructions and links that are easy to follow. They can look at the email in the web browser, download it locally if necessary, and add comments as needed.

For the Accounting team, this had made approvals simple. A FileHold folder for pending Invoices shows the approval from Courier with easy-to-track statuses for each invoice. This helps to ensure overdue or unattended invoices are addressed in a timely fashion. Courier will automatically send reminders to managers who are late without adding administrative burden on the Accounting team. Paper invoices had to be copied and sent out, but digital repository of FileHold eliminates that task. All stages of the approval process can be tracked and controlled to make the process much simpler and more efficient.

The added benefits of FileHold

FileHold provides many additional services for the GRMC in addition to Courier-based approvals. The unlimited storage of electronic documents, zonal optical character recognition (OCR) processing of [scanned documents](#), and role-based security for access were exactly what GRMC needed. FileHold can store any kind of document, so the system was not limited to just invoices – the same scanning, storage, and routing options make FileHold the perfect repository for checks, W-9s, contracts, or any other document that needs to be securely stored and controlled. The FileHold library can be backed up through standard IT practices, ensuring the backup for invoices the paper-based system lacked.

FileHold has helped the GRMC organize and centralize its documents in a secure, centralized document repository. Using the powerful built-in search engine invoices are easy to find; no more rifling through physical cabinets and folders trying to find the paper copy. Invoices are quickly searchable when they have been tagged with vital information, or metadata. The documents are even easier to find if they have been made [full-text searchable](#) through OCR as part of the document intake process. When documents are requested, they can be emailed right out of the system – no more copying or scanning paper, just click and send.

The FileHold experience

FileHold has worked hard to offer the best possible experience in getting a DMS up and running. GRMC reported they found the process very smooth, with FileHold meeting all the expected timelines with no delays or complications. They said the FileHold remote training was well organized and easy to follow, with the FileHold team standing by to assist with any questions or follow-up as needed.

Installation Environment

The GRMC installation of FileHold is the base system of five registered users. However, this minimal system still has a powerful reach to the whole organization through the power of Courier to reach many more employees. The solution was sold as an on-premise perpetual license with an annual support agreement, [FileCare](#), that gives unlimited technical support and all product upgrades. The GRMC IT department found it easy to meet the installation requirements of FileHold by creating a virtual server using VMware. The FileHold architecture does not require a dedicated instance of SQL so the customer was able to provide a small instance of their existing SQL 2008 installation. All in all, FileHold is a very cost-effective solution.

See how FileHold's cost-effective [Courier](#) solution can help your organization go paperless today! Contact sales@filehold.com.

"FileHold has definitely sped up the approval process!" – Controller, GRMC