



Polaris Drives Greater Productivity for Health Data Specialists



Customer:

Health Data Specialists
www.hds-llc.com

Industry: Healthcare

Headquarters: Louisiana, USA

Solutions

- Client billing
- Expense management
- Time off management

Challenges

- Excel-based spreadsheets were prone to delays and errors
- No mobile capabilities to submit and approve timesheets, time off requests and expenses
- Timesheets and expense reports did not align to client invoicing timeframes
- Spreadsheets required three to four days to review and manually enter into QuickBooks accounting software

Health Data Specialists, LLC (HDS) is a healthcare information services company providing consulting services to healthcare facilities in the United States. Since 2003, HDS has worked with organizations of all sizes - including regional healthcare centers, training facilities and large hospitals to design, configure and implement software applications.

A time-intensive process to client billing

Almost all of Health Data Specialists' employees work in a client's premises onsite each week. The company's significant number of field-based workforce will typically travel on Monday morning to visit the client, return home on Thursday night, and finish the week working from home on Friday. Over the years, client assignments have also increased in number and complexity, with people often working on multiple projects or with different co-workers simultaneously.

Previously, employees used Excel-based spreadsheets to enter time against client projects, and submit expenses. This was then sent to the administrative team to review, manually enter into the company's QuickBooks accounting system, then process to invoice clients and reimburse staff.

According to Troy Hendrixson, senior vice president and partner at HDS, this manual process was tedious, costly, and more susceptible to billing errors.

"Our admin team invoices our clients every two weeks, but this deadline did not align with checking against employees' time and expense reports. The process to print and review these spreadsheets took several days, and any errors we'd identify prolonged the undertaking even further. In some cases, we'd even need to revise our invoices to clients. In short, we unquestionably needed a more efficient and automated system," he said.

Hendrixson researched a number of solutions, and heard about Polaris from several colleagues working at a similar company who spoke highly about Polaris' solutions. After a more granular evaluation, HDS selected Polaris' solutions in client billing, expense management and time off management, to centralize and simplify how the company managed its workforce and cash flow.

Challenges (Cont.)

- Resource management application needed to integrate with project management solution for better forecasting and resource allocation

Results

- Cloud-based system to centrally capture and access employee time off, timesheets and expenses
- Integration with QuickBooks eliminated duplicate manual timesheet and expense entry by administrative staff
- Client invoices aligned with time to review timesheets and expense reports
- Greater accuracy in invoices sent to client
- Availability of Polaris mobile application to more flexibly and quickly submit and approve timesheets, time off requests and expenses
- Responsive customer service team to address any HDS inquiries

A smooth implementation and integration

According to Hendrixson, implementing Polaris was a very smooth process, including the time taken to train all staff on the system and ensure Polaris was integrated seamlessly into HDS' QuickBooks accounting software.

"We had a lot of checks and testing ahead of Polaris going live, but once the system was in place, we had things up and running with virtually no problems. A standout feature for us was that all the applications we selected from Polaris – tracking projects, submitting expenses, and managing employee time off – lined up with our payroll system. The ability to sync this information in the cloud was a significant time saver," he said.

“What’s fantastic about Polaris is that it supports the way people work. Whether people wait until the end of the week to complete their timesheets and expense reports, or snap a photo of the receipt as soon as they have paid, Polaris provides a great deal of flexibility.”

Troy Hendrixson, Senior Vice President and Partner, Health Data Specialists

A flexible and mobile solution, supported by reliable customer service

For employees, rather than using spreadsheets each week that are more prone to human error – given that Excel is not a system specifically designed for time tracking and expense management – HDS has reduced the time required to receive and approve everyone's timesheets and receipts. Through the Polaris mobile application, people can now enter time more quickly, and easily take photos of receipts and attach to their timesheets in an instant. Employees can also submit time off requests immediately, and review their time off balances through the application.

"What's fantastic about Polaris is that it supports the way people work. Whether people wait until the end of the week to complete their timesheets and expense reports, or snap a photo of the receipt as soon as they have paid, Polaris provides a great deal of flexibility. People enjoy using the mobile application as it's so simple to fill in all the information, no matter what they worked on or what type of expense is incurred – such as airfares, mileage, or even per diem costs. It's easy to track in the one system," Hendrixson said.

HDS has also benefited from Polaris' reporting capabilities to help the company monitor how many hours have been entered against a project. All HDS employees – from field-based consultants to back office staff – have also been impressed with Polaris' customer service and the responsiveness in addressing most inquiries.

"If we ever have any questions, we know that we can rely on Polaris' customer service team to get back to us in an instant. Polaris has a great support staff, and we recommend that all employees chat directly to Polaris if they are stuck on anything, because they are so responsive and reliable," Hendrixson concluded.



Polaris



About Polaris

Polaris, the world's first Self-driving PSA, has created a new category for Professional Services Automation. For the first time, leaders get intelligent help with decision making as Polaris does the heavy lifting, analyzes real-time data, and delivers live recommendations on the best possible choices for them to decide from. Polaris is created by the team at Replicon, the Time Intelligence company, with over 25 years of industry leadership in enterprise time tracking. Replicon supports thousands of customers across 70 countries, including PwC, SAS, NTT, NSC Global, Omnicom, and Aon.

To learn more, visit www.polarispsa.com



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www.polarispsa/live-demo



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