



2024 CASE STUDY

INVOICE PROCESS AUTOMATION

COMPANY

**TwelveStone
Health Partners**

INDUSTRY

Chronic Care Medication
Management (Infusion
Pharmacy)

BUSINESS FOCUS:

Specialty-infused medications,
both in standalone facilities
and home settings.
TwelveStone works directly
with patients, physicians,
hospitals, LTC facilities,
hospices, and specialty clinics.

LOCATIONS

22 locations across five states

OBJECTIVES

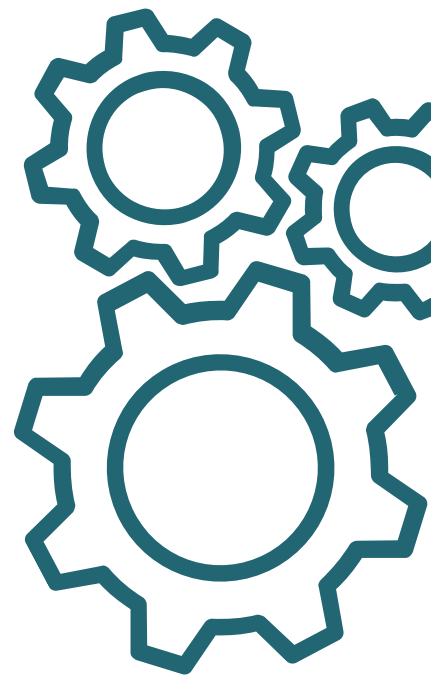
TwelveStone Health Partners faced significant challenges in managing their drug invoice data entry into their accounting software due to the amount of volume of invoices. With multiple vendors and an extensive formulary of drugs ranging in cost, it was critical that invoices were handled accurately and promptly. However, manually entering invoices required two full-time employees, making it difficult to allocate resources effectively and address other business-critical tasks.

SOLUTIONS

TwelveStone chose Optu Consulting because we deeply understood their business operations and needs. Our team was able to work with the accounting department and key stakeholders to formulate a workflow and plan to help streamline the data entry process. Our team was able to automate the invoice process by creating custom software that routinely retrieves electronic files from multiple vendors, parses the relevant data, and automatically posts to their accounting software. This significantly reduced the manual effort required and allowed the team to focus on higher-value tasks.

KEY FEATURES

- **Automation of Invoice Entry:** Optu's automation solution drastically reduced the time spent on manual data entry.
- **Error Detection and Correction:** The automation process flagged potential errors, giving the team more time to review and fix them.
- **Efficient Uploading Process:** The new system allows invoices to be automatically uploaded with a 99.6% success rate.
- **Multiple Vendors:** Our solution integrates with multiple invoice sources and parses their specific data format and files.
- **Data Mapping:** Our solution includes data mapping to ensure location and account level details are assigned during the bill creation process.



IMPLEMENTATION

The implementation process was seamless. The Optu team worked closely with TwelveStone, making necessary revisions to ensure the system met all of their requirements. Unlike previous experiences with other vendors where TwelveStone had to wait for external support, Optu provided quick and effective assistance whenever needed.

RESULTS

Automating the invoice processing system led to significant time savings, enabling the team to focus on other critical areas of the business. The project improved efficiency and helped maintain staffing levels by reducing the manual workload.

KEY BENEFITS

- **Time Savings:** The most valuable outcome is allowing employees to take on more high-value tasks.
- **Reduced Error Rates:** The automation system provided more time to detect and fix errors before they became issues.
- **Enhanced Operational Efficiency:** Employees could focus on more strategic tasks, helping the company maintain its competitive edge and grow its business.



"Optu's quick support and deep understanding of our business were instrumental in the success of this project. Their automation solution saved us significant time by reducing manual processes and led to substantial cost savings by allowing our staff to focus on more strategic tasks. We highly recommend Optu to others in the industry."

-Tammy Greer

Director of Finance,
TwelveStone Health Partners

CONCLUSION

By choosing Optu Consulting, TwelveStone Health Partners successfully automated their invoice processing system, which improved efficiency, reduced errors, and significantly reduced time spent. This project is a prime example of how understanding a client's unique business needs can lead to innovative and effective solutions.



Automation



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