



Microsoft Dynamics Case Study

Healthcare nonprofit delivers
more value from technology while
streamlining IT operations

Healthcare
Case Study

In 2013, University of Colorado Medicine first engaged Tridea Partners to complete a rapid deployment of Microsoft Dynamics AX and simplify the delivery of financial reports, at the same time improving service levels for thousands of subscribers by providing more timely reporting with the details and in the formats they require. Today, Tridea continues to support the company's ERP environment.





Medicine

University of Colorado Medicine, formerly University Physicians Inc. (UPI), is a nonprofit company closely aligned with the University of Colorado School of Medicine. The company - also known as CU Medicine - provides a wide spectrum of business and administrative services, such as billing, collections, and disbursements, to the healthcare providers at the School of Medicine's campuses and more than 150 clinics, as well as a number of its departments. Close to 3,000 individual healthcare professionals and several departments within the School of Medicine rely on CU Medicine for detailed financial reports, which they receive through subscriptions.

Solutions and services:

Microsoft Dynamics AX 2012
Microsoft SQL Server Reporting Services
Microsoft SharePoint Server
Tridea Partners implementation services and ongoing consulting

Business outcomes:

Improve service levels for healthcare professionals and clients with timely, efficient delivery of standardized and specialized reports
Enable improved financial control with greater visibility and current information
Reduce IT administrative workload, expenses, and the complexity of the technical environment
Provide planning and operational framework for realizing optimal value from technology

We can truly count on Tridea as our partner. They resolve issues promptly, respond quickly to everything we ask for, and are enjoyable to work with. Because they empower us to use our own skills more effectively, we accomplish better outcomes with less effort."

Rick Schwartz, PMP, Senior Project Manager, University of Colorado Medicine

Client

University of Colorado Medicine

Industry

Nonprofit – Healthcare business services

Client Overview

A nonprofit company providing a wide spectrum of business and administrative services, such as billing, collections, and disbursements, to the healthcare providers at the School of Medicine's campuses and more than 150 clinics, as well as a number of its departments.

Rapid deployment of new ERP system

When a legacy finance system no longer fit CU Medicine's needs, the company decided to implement Microsoft Dynamics AX 2012. The project was on a strict three-month deadline. Rick Schwartz, PMP, Senior Project Manager at University of Colorado Medicine, says, "We collaborated with Tridea Partners to implement Microsoft Dynamics AX in under three months. Their work was very impressive. They helped our finance and IT teams connect on the requirements, optimized the ERP system for our needs, and supported our testing and rollout to users."

More versatile, less costly, more efficient reporting tool

CU Medicine had been using a Solimar Rubika system to produce the subscription reports for School of Medicine healthcare professionals and departments. However, the CU Medicine IT team found the software challenging. Schwartz explains, "In Rubika, it was difficult for us to change the data feeds and formatting of reports, let alone create new reports. Our clients were

asking for more information in addition to the four standard reports we already provided. Also, setting up the individual folders and permissions for our thousands of subscribers was a huge administrative chore."

The IT team had expertise in SQL Server Reporting Services (SSRS), which is the main reporting engine in Microsoft Dynamics AX. CU Medicine worked with Tridea to re-create its reports in SSRS. "Tridea Partners succeeded where BI experts and database specialists had repeatedly failed," says Schwartz. "They enabled us to build our reports in SSRS, make changes to them efficiently, and create new reports."

By deactivating Rubika, CU Medicine not just saved annual software licensing costs, but also reduced the complexity of its IT environment. "Anytime you can simplify IT administration, reducing the number of software tools or replacing them with easier-to-use technology, you save time and make the team more effective," notes Schwartz. "Tridea made this possible for us."

Improving service levels and providing more timely and relevant reports

Once CU Medicine began using SSRS to create and deliver reports, it became much easier to offer information in the formats and with the detail that departmental clients and healthcare professionals asked for. CU Medicine currently publishes five general reports instead of the four it used to. In addition, the CU Medicine team created 15 self-service reports and 20 situational reports based on its clients' various information requirements. Subscriptions are largely automated. Departments receive summary reports on the financial aspects of the work of their healthcare professionals, and the 3,000 medical-care subscribers get their individualized information, in a more timely manner.

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Schwartz says, "It used to take us up to three months and much labor to deliver a report regarding the legal depositions of medical professionals and their payments for them. With Tridea's assistance and using SSRS, we now get this information out within a month or faster. That makes it much easier for them and the departments to see what's been paid and what's outstanding. This is just one example where we provide valid, current data and greatly improved the transparency of healthcare financials."

The feedback from users and clients has been positive. "The medical professionals are thrilled about their reports, which have become more effective in helping them manage their work," Schwartz adds. "The departments enjoy increased visibility and control, and our CFO is delighted about our service quality."

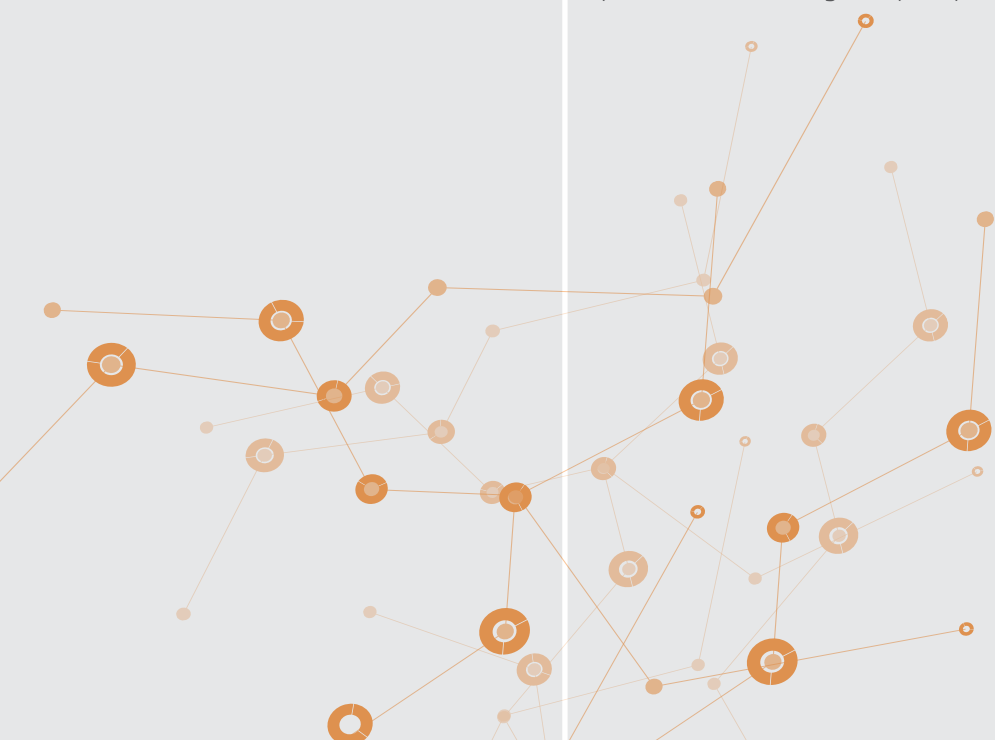
Strategic, collaborative partnership for creating value from technology

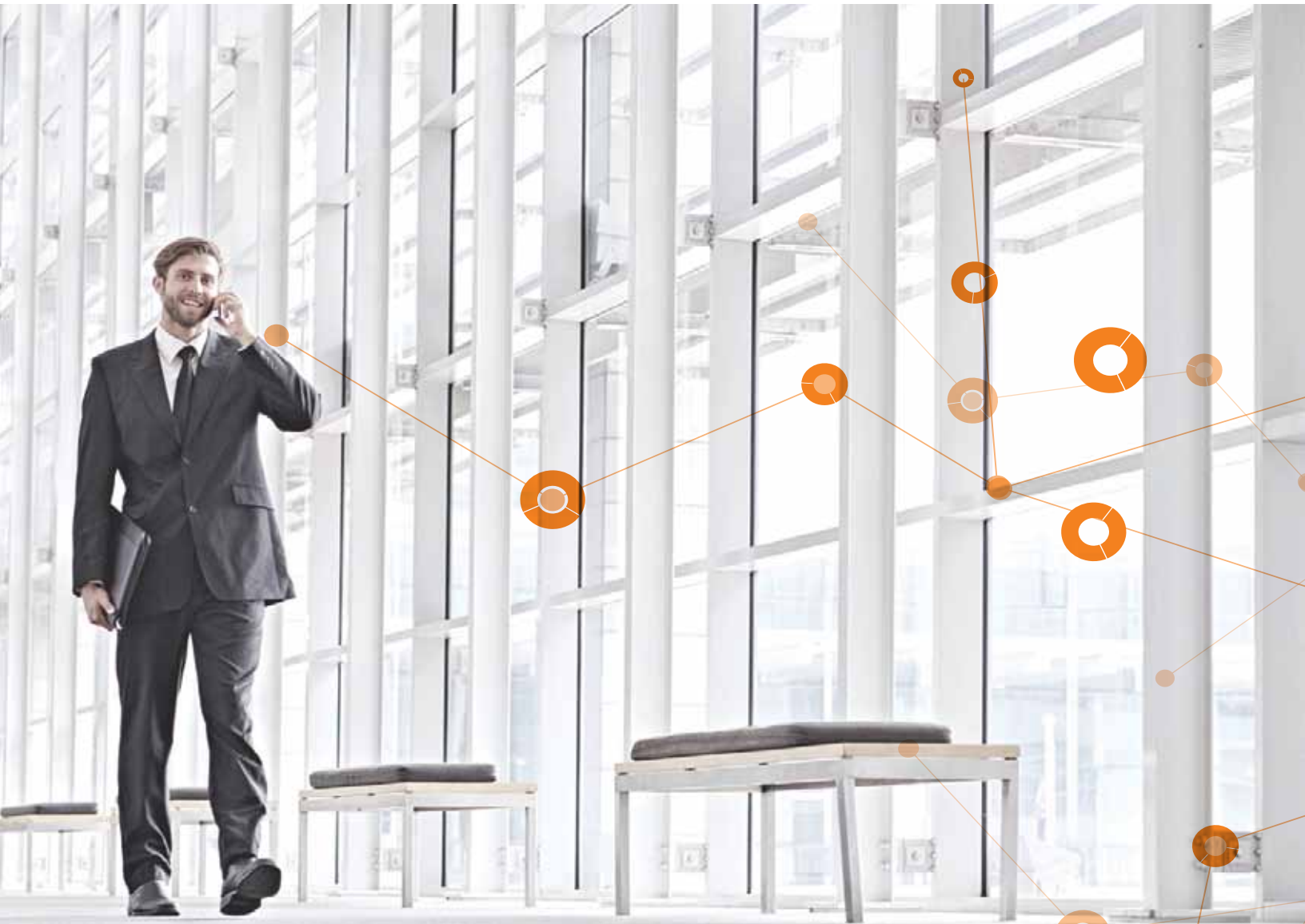
For CU Medicine, it's important to be able to engage with a responsive, accountable technology partner that can contribute a wealth of expertise and resources. Schwartz notes, "In our multi-year engagement with Tridea, we've always had the same, excellent project manager. When they added a Dynamics AX functional consultant to the team, it became much easier to translate between our finance managers and developers. They also brought on developers when we were short-handed. In working with Tridea, we always realize a quick turnaround on our requests, no matter how complicated they may be."

CU Medicine and its Tridea contacts meet weekly to discuss in-progress and upcoming projects. Near-future plans aim to further reduce the effort involved in delivering reports while increasing their promptness.

CU Medicine and Tridea will configure Microsoft SharePoint Server in such a way that finance managers can on their own take care of reports, subscribers, and report distribution without assistance from the IT department.

The IT department also draws on Tridea's competence in syncing its development, testing, and production environments, with plans to introduce automation to keep data current and reconciled in all three areas. Schwartz and some of his colleagues participate in Tridea events to learn more about technology trends and new capabilities in Microsoft Dynamics AX that could be of value for them. Summarizing the collaboration, Schwartz says, "We can truly count on Tridea as our partner. They resolve issues promptly, respond quickly to everything we ask for, and are enjoyable to work with. Because they empower us to use our own skills more effectively, we accomplish better outcomes with less effort."





At Tridea, we help our customers digitally **transform** their businesses and improve the value realization of their business application investments. We **mitigate** the inherent risks associated with implementing, upgrading and replacing legacy ERP systems. We **lead** our customers with best-practice consulting services we have refined over thousands of engagements. We take care of our customers and aspire to keep them for life.

To learn more about how Tridea can help you digitally transform your business, contact your local Tridea office.

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