Premera Blue Cross

Premera Blue Cross uses the Perceptive Content process and content management solution to speed invoice approval and streamline AP processes across its five offices and satellite locations in four states.

Challenge
Administrators at Premera Blue Cross realized that implementing an enterprise document management, imaging and workflow system would improve information sharing between locations and speed accounts payable (AP) and expenses processes. After evaluating several products, they selected Perceptive Content.

Three-day implementation
Lexmark used a proven deployment methodology to efficiently plan and install Premera Blue Cross’s customized solution, giving the organization a rapid return on its document management investment. “The implementation consultant from Lexmark was very helpful and completed the installation in just three days,” says Cherie Hooks, AP systems administrator.

Solution
Patented technology facilitated seamless integration between Perceptive Content and Premera Blue Cross’s PeopleSoft Accounts Payable and Expenses modules. Integration establishes a connection between business application records and corresponding documents in Perceptive Content, enabling users to instantly retrieve pertinent data. “The link between Perceptive Content and PeopleSoft puts supporting documents at our fingertips,” says Hooks.

“A instead of employees from our five buildings coming to the AP department to pull hard copies, they access the information they need at their desks.” “Employees use Perceptive Content on one monitor while keying information into PeopleSoft on another,” Hooks says. “Users find this to be an efficient way to work and like not having paperwork all over their desks.”

A low-maintenance solution
Hooks actively participated in the implementation and attended training at Lexmark’s headquarters. “The realistic Lexmark training experience prepared me to train users and manage the product in house,” Hooks says. “It was also helpful to see how other customers were using it during the class.”

Premera Blue Cross finds that the reliability of Perceptive Content makes it a low maintenance system. Hooks is able to manage the document management project with little assistance from her colleagues in the IT department.
“Of all the applications I’ve worked with, Perceptive Content is the easiest to administrate,” Hooks says. “One of the biggest benefits of the system is that we didn’t have to bring someone in to manage it.”

The value of dedicated professional services

Hooks feels that Lexmark’s customer-focused approach has added value to Premera Blue Cross’s document management project. “The Lexmark team cares about us and the success of our plan,” Hooks says. “We feel appreciated, which is something you don’t get with most vendors.”

“When I went to Lexmark’s headquarters for training, each person who was involved in our project took the time to meet with me,” Hooks adds. “Working with the company has been a great experience.”

As part of its continued commitment to Premera Blue Cross, Lexmark conducted a post-installation assessment to help the company optimize its solution. “The post-installation assessment enabled us to find new ways to use Perceptive Content that add value to our business processes,” Hooks says.

Results

Premera Blue Cross has five offices on its main campus and satellite offices throughout Washington, Oregon, Arizona and Alaska. Sharing information across this large network was challenging when using hard copies. Prior to implementing Perceptive Content, Premera Blue Cross satellite offices waited two days for mailed invoices to arrive. After managers approved invoices, they mailed the documents back to the AP department.

Sharing invoices across locations in real time

Now, Perceptive Workflow routes scanned electronic invoices to the appropriate AP associate’s work queue for processing. Replacing manual workflow with automated processes has expedited approval and reduced paper output and mailing costs.

“Perceptive Content enables us to share information with associates in other locations more quickly than when we used paper processes,” Hooks says. “It has extended rapid document access to everyone.”

AP account specialists use Perceptive Workflow to send documents to approving managers at satellite offices who sign off on the invoices and then route them back. The specialist then enters invoice details into PeopleSoft, links each invoice to the corresponding voucher in PeopleSoft and routes the documents to a colleague who reviews all invoices. The reviewer verifies data accuracy and then forwards documents to a complete queue.

“Before we implemented Perceptive Content, approving invoices for our satellite offices could take five days or more,” Hooks says. “Automating our business processes with Perceptive Workflow has made approval much faster.”

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Cherie Hooks, AP Systems Administrator
Premera Blue Cross
Improved content tracking

Perceptive Workflow gives managers at Premera Blue Cross a complete history of each document, making it easy to monitor the timeliness of approvals.

“When we sent documents by mail, we didn’t know where invoices were when they left our desks,” Hooks says. “Perceptive Content improves accountability because when we forward a document to a colleague we still have access to it, and we know exactly where it is in workflow.”

Like most Lexmark Customers, Premera Blue Cross realized that the time and cost savings created in the AP department could be extended to other areas of the enterprise. The organization plans to push for similar results for its document management project in purchasing, human resources and payroll.

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