

Nationwide Medical, Inc.

CLIENT SUCCESS: PROCESS AUTOMATION AND DATA INTEGRATION

SNAPSHOT



ORGANIZATION

Based in Agoura Hills, California, Nationwide Medical, Inc. provides CPAP and other respiratory therapy solutions to patients based on doctors' prescriptions and referrals.

CHALLENGE

Enable timely and accurate processing of resupply orders; reduce manual data management practices; facilitate expansion of sales volume to support business growth.

STRATEGY

Use Microsoft SQL Server Integration Services to integrate legacy information systems; automate data entry and data validation processes; standardize business rules.

RESULTS

Process automation and systems integration improve operational efficiency, enabling Nationwide Medical to fulfill more orders in less time with greater accuracy. The solution is forecast to save the company \$92 thousand per year.

Nationwide Medical is a medical equipment company that provides respiratory therapy supplies including continuous positive airway pressure (CPAP), oxygen therapy, and non-invasive ventilation. Based in Agoura Hills, California, the company serves over 35,000 patients each year with an emphasis on aftercare. Nationwide Medical provides care directly to patients, based on doctors' prescriptions and referrals, and generates over \$30 million in revenue per year.

Serving this large patient base requires significant infrastructure. Until recently Nationwide Medical relied on numerous manual data management processes to fulfill as many as 10,000 resupply orders per month. These practices were time consuming, cumbersome, and created the potential for errors. Business rules were not standardized or centralized efficiently. The company used information systems from Velocify and Brightree in its order fulfillment processes. But the systems were not integrated, so significant effort was required to move data between them. As many as 19 manual steps were required for resupply orders, which account for over 50 percent of the business.

Sara Cruz, director of operations at Nationwide Medical, asked Visus LLC to help them achieve digital transformation. Company leaders sought to leverage the latest technology to automate manual processes so they could improve operational efficiency, enhance patient satisfaction, and establish scalable standardized practices that would position the organization for future growth.

Visus used the workflow and data management capabilities of SQL Server Integration Services, coupled with the depth of programming and extensibility of C#.NET to create a solution. The new system automates data retrieval from the Velocify CRM API, validates the data against a lengthy set of criteria, provides immediate feedback through Velocify on discrepancies, and enters order information via Brightree's API while keeping Nationwide Medical's systems up-to-date on the status. Throughout the process, error handling and logging were implemented to provide additional feedback and alternate resolutions in the case of communication issues between systems.

"Previously, we manually exported data from Velocify CRM into Excel spreadsheets, manipulated it to ensure accuracy, formatted it, and moved it to Brightree's order management system," Cruz explains. "It required hours of labor and was error-prone. With the Visus solution all of that is done more accurately and efficiently without human intervention."

"The Visus digital transformation solution automates data input and data validation processes, which eliminates human errors so we no longer need to manage as many quality control touchpoints."

– Sara Cruz, Director of Operations, Nationwide Medical

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David Siegel, CEO at Nationwide Medical, says a key driver for the digital transformation engagement was the need for technology that can support increased order volumes while preserving the company's ability to provide personal patient care. "With our traditional practices, we could process as many as 10,000 orders in a month; but we didn't have the capability for 20,000," he says. "Visus showed us how digital transformation through process automation and systems integration could make our operations more effective so we can expand our sales and improve the service we provide to our patients."

In the past, customer service professionals at Nationwide Medical fulfilled reoccurring orders by copying a patient's previous order. They had to examine records for missing or inconsistent data, update detail item rows for changes to a patient's standard order, and manage changes to delivery addresses with their fulfillment partners. The new solution recreates orders directly via API in Brightree.

"The solution that Visus implemented shaves minutes off the processing of each resupply order. When you multiply the speed and accuracy improvements by thousands of orders, the rewards to the business are evident."

– Aymee Flynn, Order Processing Manager, Nationwide Medical

The Visus solution reduces the processing time for each order by automating cleanup and validation of data. The estimated reduction in labor is two to four hours per day, which frees personnel to focus on core business activities. "The digital transformation solution that Visus implemented not only increases productivity for our business, it benefits our patients as well," says Aymee Flynn, order processing manager at Nationwide Medical. "Our patients now get much better service through an automated process that verifies all of the information automatically and eliminates the need for manual updates, which could be error prone. This helps us greatly with patient retention."

Another advantage of the new technology is process standardization. The Visus solution enforces strict parameters for valid order entry practices. This improves the quality of data that moves through the ordering systems and

ensures proper processing. "Previously our analytics team spent hours each day manually verifying that orders were in line with business rules, which are required for compliance with insurance payers," Cruz explains. "Visus standardized, centralized, and automated our business rules and process. Now they can be accessed and updated by authorized users across the organization instead of residing in the minds of a few people who have been doing the same job for a long time."

Positive Impacts of a Successful Technology Engagement

Digital transformation is a fast-growing trend that analysts at International Data Corporation (IDC) predict will reach \$2 trillion in global spending by 2022. Digital transformation involves leveraging modern digital technology to increase operational efficiency and enhance customer engagement. For Nationwide Medical, these improvements directly impact the bottom line. "Our investment in the Visus project was fifty thousand dollars, and we forecast that the new technology will save us ninety-two thousand per year," Siegel reveals. "The investment will pay for itself in less than six months."

The resupply orders automation project transpired over approximately four months and included on-site meetings as well as Zoom video sessions, screen sharing, telephone conferences, and virtual walkthroughs. The team at Nationwide Medical says Visus provided an atmosphere of trust by emphasizing clear communication through every step of the process.

"The Visus methodologies and pricing were transparent, which established a comfort level for us in the exploratory phase when we weren't sure what the final goal was," Siegel explains. "At the outset we didn't have a clear understanding of our problem. Visus helped us diagnose the essential business need. Then they described options for solutions that could systematically resolve the everyday issues our employees faced and generate long-term efficiencies for the business."

"The Visus team helped us better understand our business and its challenges," adds Chantele Foster, data analytics manager at Nationwide Medical. "Prior to the technology engagement, my staff was grinding away with daily

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challenges that we didn't think there was any remedy for. Visus showed us that the difficulties we were experiencing were unnecessary and that through digital transformation they could provide an automated solution that would resolve our issues."

Cruz confirms the impact of the Visus engagement. "By keeping communication at the forefront, Visus enabled our management team to open their minds to concepts that they otherwise would not have considered," she says. "For example, early on they had us compile a wish list. That led to brainstorming that revealed the inadequacies of our manual processes and the need for process automation and data integration. As a result, our business is now more efficient and scalable, and our patients get better service."



David Siegel
CEO,
Nationwide Medical



Sara Cruz
Director of Operations,
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Chantele Foster
Data Analytics Manager,
Nationwide Medical



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Order Processing Manager,
Nationwide Medical

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