



## Kofax Case Study

“We view Kofax as one of our primary strategic partners as we look at deploying solutions that utilize our enterprise content management technologies. It has flexibility and scalability to deploy a variety of solutions that can meet the needs of our various business units.”

– Brian Harris  
Executive Director of Web Operations,  
Loma Linda University



Loma Linda University Health includes Loma Linda University's eight professional schools, Loma Linda University Medical Center's six hospitals and 800 faculty physicians located in the Inland Empire of Southern California. Established in 1905, LLUH is a global leader in education, research and clinical care. It offers over 100 academic programs and provides quality healthcare to 40,000 inpatients and 1.5 million outpatients each year. A Seventh-day Adventist organization, LLUH is a faith-based health system with a mission “to continue the teaching and healing ministry of Jesus Christ.”

### Loma Linda University Health Modernizes Processes with Kofax Capture

Kofax Capture and Kofax Transformation Modules Increase Efficiency for Accounts Payable, Student Records and Medical Imaging

#### The Challenge

As both a university and a major medical center, Loma Linda University Health (LLUH) is a large and complex organization. And like other rapidly growing and successful enterprises, LLUH faces a classic technology problem: how to replace a variety of software products and manual processes with efficient, automated processes built on a scalable, robust enterprise solution.

“Being in both the healthcare and higher education industries, we’re both paper intensive and very manual-process intensive,” says Brian Harris, Executive Director of Web Operations at Loma Linda University Health. For many of its transactional processes, such as accounts payable and student records, LLUH perceived that implementing an enterprise-wide capture-driven system could potentially save the organization millions of dollars annually and significantly improve productivity.

“When we first started looking at document capture,” Harris recalls, “we had a number of isolated document capture solutions, or really just traditional scanning products used in some of the high-volume areas.” In fact, Harris says, many of the high-volume transactional areas “weren’t using any kind of capture solution.” Instead, data were entered into the system by manually keying data from hardcopy forms.

Although an enterprise-level document capture solution would provide departments and business units with a more efficient approach to capture, search and business intelligence, Harris knew that introducing a significant change like this would involve more than just rolling out the new technology. “Our challenge has been in shifting the culture,” Harris says. As individual departments were accustomed to their own solutions, employees felt comfortable with these familiar, manual processes, even knowing they weren’t very efficient.

Moreover, organizational structure – with education on one side and healthcare on the other – only complicated matters at LLUH. Although some capture requirements are certainly similar across departments, most handle very different types of information. For example, on the healthcare side LLUH processes some 23 million images per year for medical records, and up to 80% of the processes involved in capturing and managing these images has been done manually. On the university side, student records, admission

applications and administrative records were key areas that would benefit from capture-driven transactional processes.

Several years ago, Loma Linda University Health contracted a detailed analysis of its capture processes. Initial projections suggested cost savings up to \$4 million per year from implementing accounts payable automations, and \$250K in annual productivity gains from utilizing electronic invoices. LLUH then began looking for an enterprise capture platform “that would be flexible enough for a variety of different document types, across a variety of different business units,” Harris says. The capture solution needed to have the “flexibility, adaptability and scalability to grow with the organization as we became more resourceful in how we captured information.”

## The Solution

After reviewing products from a number of vendors, Loma Linda University Health selected Kofax Capture™ along with Kofax Transformation Modules™ (KTM) as the foundation for its enterprise capture platform. Kofax Capture automates documents scanning and extracts index data for retrieval purposes, delivering the images and associated data to a variety of repositories and applications. KTM adds document classification, page separation, data extraction and validation capabilities to Kofax Capture to drive robust capture-to-process applications.

Kofax was the obvious choice, says Jeremy Hubbard, Director of Business Innovation at Loma Linda University Health: “Kofax is the market leader in enterprise capture.” Having investigated a number of partners and solutions, LLUH noticed that many other solutions were built on underlying Kofax technology. Hubbard says that fact underscored the value of working directly with Kofax itself. “Capture is Kofax’s bread and butter, their core investment in terms of R&D,” he says.

Loma Linda University Health currently uses Kofax solutions in its risk management, human resources, general counsel and accounts payable departments. LLUH is also implementing an automation of the student records department, expected to go live in early 2013.

For LLUH, a secondary benefit of using Kofax was its relationship with BCS® Systems, a Kofax Platinum Partner with industry experience in healthcare and education. LLUH had already been working with BCS Systems on other initiatives; and given its complex IT environment, LLUH trusted BCS to provide the right level of customization without having to reconfigure everything, Hubbard says.

## The Results

Among the first departments to be enhanced with Kofax were purchasing and accounts payable. These solutions have been “extremely successful,” says Hubbard: “Before, someone would manually enter invoice information into the system,” he says, “Now many of our purchasing and AP processes are almost 100% automated.”

Not only does Kofax Capture make AP processes much faster and more efficient, it also makes the scanned information immediately available for search and analysis. Previously, invoices would be scanned and entered into the system in batches, perhaps once a week. Now invoices are scanned upon receipt. This gives the financial teams more traction around spending, with the ability to perform real-time analysis on that data and respond to changes with greater immediacy.

KTM, a suite of add-on applications for Kofax Capture, enables LLUH to streamline the transformation of documents into structured electronic information by automating the process of document classification, separation, data extraction and validation. For example, adding validation capability within the capture process has been a tremendous time saver. “KTM captures the information, puts it in the appropriate fields and highlights any missing information,” says Hubbard, “so you can quickly go through different invoices – click, click, click. It’s very intuitive for our scan operators. It really makes sense.”

When Kofax was first deployed at LLUH, the team initially scanned 2.5 million documents. The organization now scans and processes thousands of documents daily. “At a very basic level, Kofax has transformed the way some of our key business units do business,” says Hubbard.

And yet, Hubbard concedes that selling this transformation to internal stakeholders has not always been easy. “Some departments prefer manual processes because it’s comfortable for them,” he says. “But when they experience firsthand how much time and effort it can save, they understand how that translates into better service for students and patients. That’s when they become champions for the cause.”

Looking forward, LLUH has big plans for leveraging the capabilities Kofax provides. LLUH will shortly complete its student records project. “That’s going to be a big win for us,” Hubbard says, noting it will have a significant impact for stakeholders at Loma Linda University.

The organization is also investigating Kofax Mobile Capture™ – a product that lets employees use their smartphones or tablets to snap a photograph to initiate business processes at the earliest point in the process. This will provide tremendous convenience for medical personnel, faculty, and others on the go, says Hubbard.

While he thinks about the next innovation built on enterprise capture, however, Hubbard is quick to recognize the impact Kofax has already had at Loma Linda University Health: “Having our information captured and stored digitally, that’s been huge.”

## About Kofax

Kofax® plc (LSE: KFX) is a leading provider of innovative smart capture and process automation software and solutions for the business critical First Mile™ of customer interactions. These begin with an organization’s systems of engagement, which generate real time, information intensive communications from customers, and provide an essential connection to their systems of record, which are typically large scale, rigid enterprise applications and repositories not easily adapted to more contemporary technology. Success in the First Mile can dramatically improve an organization’s customer experience and greatly reduce operating costs, thus driving increased competitiveness, growth and profitability. Kofax software and solutions provide a rapid return on investment to more than 20,000 customers in financial services, insurance, government, healthcare, business process outsourcing and other markets. Kofax delivers these through its own sales and service organization, and a global network of more than 800 authorized partners in more than 75 countries throughout the Americas, EMEA and Asia Pacific.

For more information, visit [www.kofax.com](http://www.kofax.com).