



Shands Jacksonville Medical Center Finds The Right Tools For Contract Management

SITUATION

Large medical center finds paper routing of enterprise-wide contracts and agreements inefficient, frustrating and time-consuming. E-mail routing improves process slightly, but issues remain.

OBJECTIVE

Create an electronic routing and approval system for contracts and agreements. Eliminate problems with different parties reviewing differing versions. Speed up and streamline the process for greater productivity. Find or build a system allowing the medical center to work in their preferred fashion, instead of being forced to adapt to software requirements.

SOLUTION

Kodak i30 Scanners teamed with **HAMi PaperTracer** Software.

COMMENT

"We've eliminated so much paper, inefficiency and wasted time. I am extremely happy with the combined solution...in our contract management process."

~Debbie Monseratt,
Contracts Administrator for
Shands Jacksonville Medical Center, Inc.

Debbie Monseratt, Contracts Administrator for Shands Jacksonville Medical Center, Inc. likens her new hardware/software solution for contract management to having the right equipment to build a house. "You can't do the job properly without the best tools, although we did it for years with a paper-based system. It is so much better when you use the correct tools," says Monseratt. "Before, it was incredibly time-consuming and difficult to manage."

"Now, the combination of our Kodak i30 Scanners and PaperTracer Software from Health Asset Management, Inc. (HAMi) gives us the power to do it far more efficiently, saving time and money."

Handling contracts by the thousands

Monseratt's department at Shands, which is affiliated with the University of Florida, handles a wide variety of contracts. Everything from lease agreements to sales and purchasing contracts, for services ranging from high-tech diagnostic equipment for the hospital to software purchase agreements. "We have a somewhat unique system at Shands," she notes. "There are 150 responsible managers using the system at this time. These managers deal with various vendors, then submit the appropriate paperwork—including contracts, agreements and so on—to our department. We then route these documents to our legal, finance, and other departments for review and approval."

In the past, Monseratt routed everything in paper form, often by faxing or traditional mail. E-mail with a **Microsoft** Word document attached was eventually added to the mix. But even e-mail did not provide a means to overcome the biggest

issues to routing productivity. "People were constantly dealing with different versions," she says. "There might be a change from our attorneys, who are in Gainesville. Yet the finance folks could be looking at a previous version. It was very hard to make sure everyone was on the same page, so to speak, and it was incredibly time-consuming. Reconciling all the changes and gaining final approval could drag on and on."

Discovering a better solution

The Contracts Administration department began its search for a more streamlined, productive electronic solution in October, 2003. They purchased the **PaperTracer** Software and two **Kodak** i30 Scanners in July 2004, following an exhaustive research and review process. The new system went live in January, 2005. "Almost all the software products we looked at wanted us to adapt to the way that they were designed to work," Monseratt recalls. "We learned that to create a new database—or significantly alter templates—we would have to contact the company and give them the time to write the changes we needed. With HAMi and **PaperTracer**, they adapted to the way we needed to do business. With a brief training session, HAMi showed me how to create departments and I designed the templates myself. Because the templates are dynamic, I can create a new database or alter an existing one in minutes. Instead of making us fit our square peg into their round hole, they allowed us to create a variety and many variations of square pegs which provide the flexibility we want."

At the front end of the system are two **Kodak** i30 Scanners, recommended by Michael Tarpley, CEO of HAMi Software Development. HAMi works with Kodak as an Independent Software Vendor. "Michael suggested the **Kodak** Scanners



and we've been delighted with them," says Monseratt. "We also have an older higher-volume scanner from another manufacturer which is very, very large. The **Kodak** Scanners sit right on our desktops and work directly with our **PaperTracer** Software and PCs. They're very compact, seem highly reliable, and more than fast enough for our use."

Monseratt and the assistant for legal services in her department both use the scanners, appreciating the accuracy and ease-of-use of the machines. Monseratt, familiar with scanning, installed her own machine and was up and scanning in minutes. "We use the **ReadIris Pro 9** OCR Software, provided by Kodak and we're very happy with its performance as well," she says.

Empowered to create a better way of doing business

Today, Monseratt claims the difference between the "old days" of paper and the new system is remarkable. "Someone will stop in with a contract and I'll put it in the **Kodak** Scanner and hand it back to them in an instant," she says. "No more running to the copy room or faxing, everything is done electronically from my desktop. The many managers appreciate the increased efficiency—having contracts at their fingertips available in the HAMi system—and the much

quicker turnover for the review and approval process. Now, rather than manually sending contracts for review, the **PaperTracer** Software electronically routes to all concerned parties with an e-mail notification and link to the file." Within the program is a comment and review module, designed by Shands, where those reviewing are always in the loop. *Now, everyone is really on the same page!*

Monseratt has established various, differing databases for several departments within Shands. "Each area collects different data, and the beauty of the **PaperTracer** Software is that it's so easily customizable," she notes. "It also allows us to restrict and allow access to our databases, too. We can easily establish levels of security and close off some databases."

Her department has even streamlined their information universe by creating a database for closed files and supplying a reference database with example templates and forms, a user's manual, articles on contract negotiation, checklists of mandatory items, and other useful background material.

"One of the things I love is that there is no waiting for our IT department or a vendor," Monseratt says. "I'm the administrator and we do all the programming here. I actually showed our IT manager how easy it was to set up a database and she was using it within a short time to store IT contracts.

Having this autonomy is completely empowering and it takes a burden off our IT people, while allowing us to achieve much greater productivity."

"When you combine the Kodak Scanners and PaperTracer Software, we've eliminated so much paper, inefficiency, and wasted time. I am extremely happy with the combined solution of HAMi and Kodak Products in our contract management process. I would never want to return to the old way of doing things."

Monseratt hopes all the research she did before arriving at this solution will help others in similar roles working with contract administration and management. "While I wish that someone had done this before me and I could have benefited from their knowledge, I know that this is a wonderful answer. I'm always happy to recommend the **Kodak i30** Scanners and **PaperTracer** Software as a life- and work-changing experience with amazingly positive benefits."



The compact size of the Kodak i30 Scanner brings productivity to every desktop.