Improving the payment approval process

Why it's important

State statute requires that all approvable invoices be paid within 30 days of receipt. To meet this timeframe consistently, the payment approval process needs streamlining.

The current process requires printing electronic invoices to obtain approval, hand tracking, and routing printed materials through interoffice mail, which can take up to 4 days.

The team realized that a fully electronic review and approval process would be more efficient, reducing costs and staff time. Improving the payment approval process will eliminate waste and increase customer satisfaction with more timely payments.

What's the issue?

The current process for routing invoices is an inefficient use of staff time and printing costs.

► Invoices are received within programs and the Operations division, and routed through several individuals for approval.
► The current process requires unnecessary printing of invoices and supporting documents.
► Receipt dates must be tracked manually to ensure compliance with state prompt payment requirements.
► These inefficiencies create unnecessary work and delays in moving the invoices to the Fiscal section for payment.

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What we did

The team documented the steps in the current process, then identified duplicative or wasteful steps to guide the development of requirements for a new process. After consulting with staff and managers, they eliminated steps that did not add value and created a new process map and a draft prototype that is nearly ready for final development and testing.
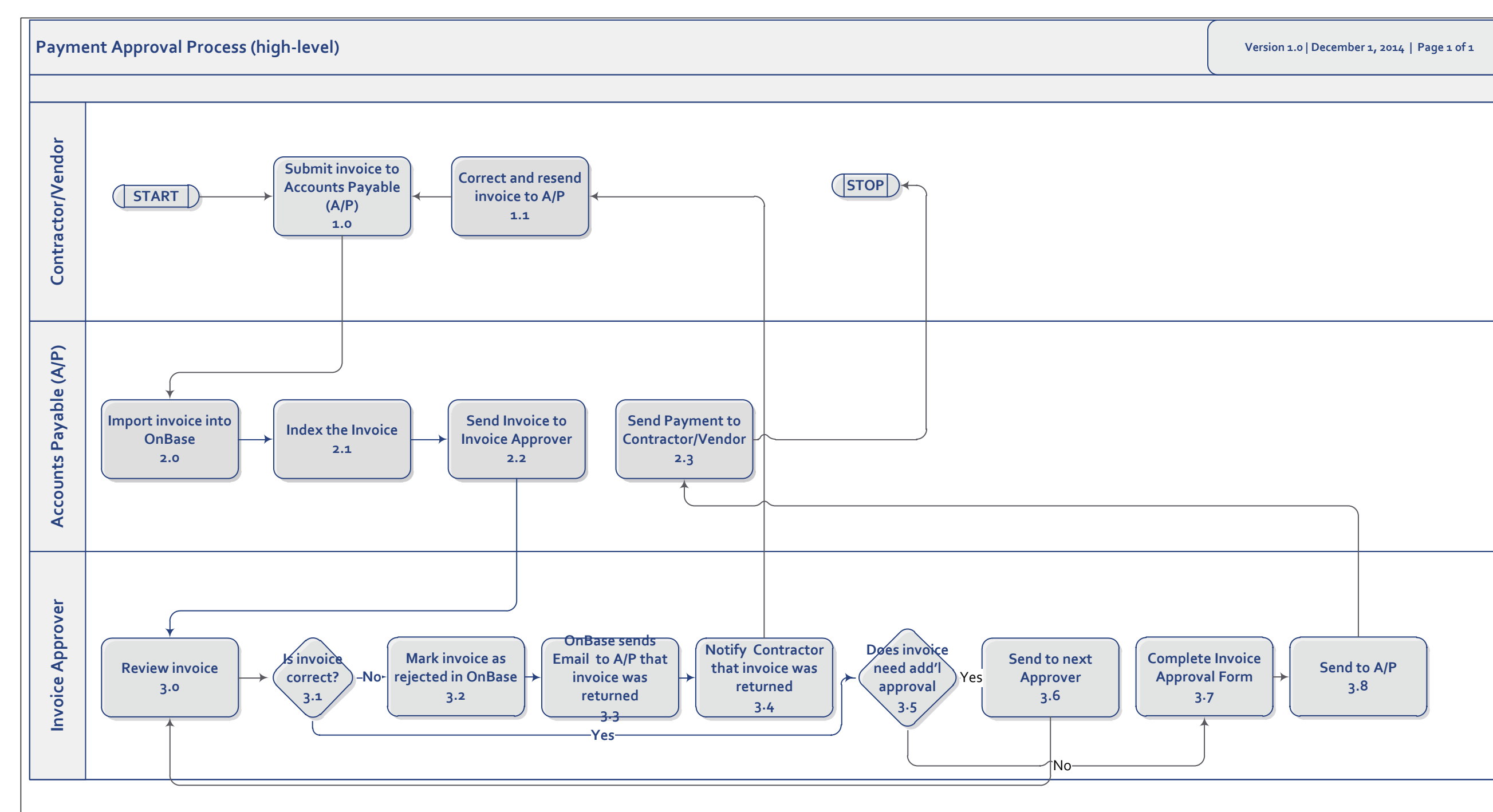
Results

The table below shows the savings expected once the new workflow is in place. In addition to cost savings, the project should result in:
► More complete data/files
► More timely information for fiscal and program staff
► Greater transparency in the payment approval process
► More timely payments