

Healthcare

Coast Surgery Center Case Study

Overview:

Coast Surgery Center is a freestanding ambulatory surgery center. They are 100% physician-owned and operated and known for their quality and customer service. Coast Surgery Center is dedicated to support the “latest innovations in orthopedic and pain care which combines the expertise of surgeons, rehabilitation specialists and pain care specialists in developing effective, protocol-driven treatment plans”. In order to provide their patients with these services and focus on patient care, they need their non-clinical business operations to run as smooth as possible and to accomplish this without compromising their high standards regarding audit regulations.

Challenge:

After separating from their corporate partner, Coast Surgery Center decided to move away from their current Peoplesoft application. “We realized that Peoplesoft was no longer compatible with our business model,” says Tamie Keltner, Administrator, Coast Surgery Center. “We needed something that was more user-friendly and would also provide us with the internal audit trails necessary for a company our size.” After moving from a large centralized environment, Coast Surgery Center was looking for the right balance between functionality, efficiency and ease of use. They needed to focus their overhead dollars on customer care/revenue generating support processes and not replicating every process of a large corporate shared service center that performed the back office functions previously.

Solution:

After careful review of several groups and the applications provided to mid-sized companies, Coast Surgery Center chose Tridea Partners and Microsoft Dynamics Great Plains. Tridea Partners has a unique blend of consultants that understood how to manage Coast Surgery Center’s business processes, and the accounting skills and IT experience to implement a Great Plains solution that would fit their business model.

Drawing upon Tridea Partners Experience and Expertise:

“Great Plains is very easy-to-use and it works like familiar Microsoft software allowing us to put the focus primarily on our patients and not behind the scenes,” explains Keltner. Coast Surgery Center was able to transition easily to Great Plains because of their knowledge with other Microsoft products such as Excel. During the critical month end reconciliation they are able to tie their AdvantX customer care and billing system with Microsoft Great Plains through custom SmartLists and its integration with Microsoft Excel, thus providing them with a more efficient work flow process in the complicated area of Health Care Billing.

From an audit trail perspective, this new legal entity Coast Surgery Center was given feedback on the audit process when bringing the back office functions in house from their CPA partner. Coast Surgery Center decided that Great Plains would give them the necessary audit trail information to keep the audit process as efficient and painless as possible.

In addition to the standard audit trail functionality, Tridea Partners supplemented the internal controls by writing custom documentation of each Coast Surgery Center process in Great Plains for training purposes. This not only provided Coast Surgery Center with documentation detailing process controls, but it also provided training guides for both current and new employees.

"Mostly, I was impressed by Tridea Partners deep knowledge of the product and willingness to dig in and figure out exactly what I needed," Keltner remarks. "Over the years I have worked with everyone at Tridea Partners, and I am continually impressed by their professionalism and understanding of Great Plains. We have developed a genuine partnership."