



KnowledgeTree[™]
Document Management Made Simple

Sandwell Mental Health and Social Care
NHS Foundation Trust

CASE STUDY - Sandwell Mental Health and Social Care NHS Foundation Trust

"I was impressed by both the flexibility and the stability of the KnowledgeTree platform. After viewing various other DMS packages over a period of time, KnowledgeTree ticked all of the right boxes for functionality, flexibility, usability and value."

Shaun Middlemas, ICT Services Manager, Sandwell Mental Health and Social Care NHS Foundation Trust

Seeking New Efficiencies

As part of the UK National Health Service, Sandwell Mental Health and Social Care NHS Foundation Trust provides inpatient and residential services for a local population of nearly 300,000. In addition to an administrative headquarters, the Trust has 30 sites spread across the borough, including hospitals and clinics. The Trust employs approximately 1,200 staff, including psychiatrists, psychologists, mental health nurses, occupational therapists, support staff, family therapists and social workers.

Although many of the Trusts in the NHS had implemented document management systems (DMS) for clinical and administrative needs, Sandwell had not yet found one that met its needs.

Mark Semczyszyn, a consultant to the Trust, wanted a DMS that would conform to existing business processes without requiring radical changes to the way people worked. He also wanted a system that would work well across the organization, not just be specific to one function, such as accounting or clinical management.

As with any large organization, Sandwell deals with numerous invoices that need to be paid in a timely manner, but the invoice approval process was manual and time-consuming. The process had potential for streamlining, and working closely with the finance department, Mark saw that a DMS would be a great way to introduce efficiency and reduce frustration. At the same time, Sandwell would be gaining a system that could be leveraged for other departments as they chose to deploy it.

Streamlining with KnowledgeTree's Document Management Solution

After a demonstration of KnowledgeTree's capabilities and an evaluation period, it became clear that KnowledgeTree could meet the Trust's requirements as well as any other system in the marketplace – at a fraction of the cost.

Once implemented in the finance department, KnowledgeTree had a significant impact on the invoice payment process:

- As soon as a paper invoice is received, it is scanned and entered into KnowledgeTree.
- The invoice is assigned a reference number generated by the Sage financial system that effectively ties the document into the overall payment process.
- Using the email function from within KnowledgeTree, the invoice is sent to the approving manager.
- The manager approves (or rejects) the invoice, provides the relevant budget code and returns the document via KnowledgeTree email.
- The approved invoice is marked as cleared for payment.

The email trail, invoice, authorization to pay and any other documentation remain in the KnowledgeTree repository and are all tagged with the reference number. Using KnowledgeTree's powerful search functionality, the Trust can search for a reference number and see all the transactions that occurred for a particular invoice. The new process enabled by KnowledgeTree prevents invoices from becoming lost or buried during approval and ensures that they proceed in a timely fashion toward payment.





KnowledgeTree™

Document Management Made Simple

KnowledgeTree Meets the Trust's Needs on all Fronts

KnowledgeTree began delivering benefits from the outset, first with its affordable price and then with the way it streamlined the invoice payment process. Shaun Middlemas, ICT Services Manager noted "I was impressed by both the flexibility and the stability of the KnowledgeTree platform. After viewing various other DMS packages over a period of time, KnowledgeTree ticked all of the right boxes for functionality, flexibility, usability and value. I'm confident that as we roll KnowledgeTree out into the rest of the organization, it will meet a variety of business needs without requiring significant changes to the way we currently do things. Its one of the best purchases the Trust has made for Corporate support services, which will also hit other strategic elements of the business as we move forward."

According to Jo Cadman, Deputy Director of Finance, "KnowledgeTree removes all the problems in trying to keep track of invoices and where they are within the business at any given time. Consequently this removes some of the tension between the finance department and services, improves internal control and makes sure that suppliers are paid in a timely manner".

Other corporate and clinical departments at the Trust will soon be using KnowledgeTree as part of the organization's push for document management.



About KnowledgeTree

KnowledgeTree is an enterprise content management provider focusing on affordable document management software that is easily installed and used by business professionals. Offering commercial SaaS and on-site editions as well as a free, open source community edition, KnowledgeTree's features – including workflow, version control and audit trails – help organizations manage the document lifecycle, promote collaboration, reduce paper and ensure compliance.

As a commercial open source company, KnowledgeTree is committed to affordability, accessibility and integration across operating systems and applications. Customers include organizations of all sizes in many industries, including life sciences, legal, financial and government sectors. KnowledgeTree is headquartered in Raleigh, NC.