

## Client Success Story

# Surgical Services Firm Speeds Search and Retrieval of Vital Accounting Documents

### Client Profile

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**FEATURED CLIENT**

AMSURG

**WEBSITE**

[amsurg.com](https://amsurg.com)

**INDUSTRY**

Healthcare

**AMSURG, the Envision Healthcare solution for ambulatory surgery centers (ASCs), collaborates with physicians and health systems across the country to provide and promote quality patient care. The company is based in Nashville, Tennessee.**

**“Closing the books on our centers requires a lot of supporting documentation and effort. Moving to KnowledgeLake has allowed our accounting staff to find documents much more easily and quickly.”**

– Corey Cross, Senior Network Administrator

### BUSINESS NEEDS

AMSURG has a large presence nationwide. It has more than 250 ambulatory surgery centers (ASCs) in 34 states and provides physician services in 24 states, employing more than 2,800 physicians and other healthcare professionals. This vast network of healthcare facilities and practitioners generates an immense amount of financial documentation, particularly at the end of each month.

However, methods that the company used for backing up its accounting documents were outdated and inefficient.

“Our accounting team was digitally recording journal entries, but we had no way to digitally store the related documentation,” says Corey Cross, senior network administrator for the company’s IT department. “People were printing out copies of documents—including screen shots of journal entries—for backup and then putting these paper documents in boxes.”

The company kept the boxes in the office for a year, after which they were shipped to an off-site facility for long-term storage.

“When any kind of research was required, our staff could spend hours going through the boxes looking for the right documents,” Cross says. “And it got worse when the boxes were off site. They would put in a request for a specific document, but it could involve looking through years’ worth of boxes, which could take days. We knew that there had to be a better way to manage our journal entries so they could be both easily stored and retrieved.”

## **SOLUTION**

AMSURG deployed KnowledgeLake’s Intelligent Document Processing solution, enabling the healthcare provider to take complete control of the document lifecycle. The company evaluated solutions from several vendors, including OpenText, OnBase, and PaperVision from Digitech, but ultimately chose KnowledgeLake.

“We had already invested heavily in Microsoft SharePoint, and our users are quite familiar with it,” says Cross. “KnowledgeLake’s seamless integration with SharePoint combined with the functionality that we were looking for made KnowledgeLake a natural fit.”

KnowledgeLake makes it quick and easy for employees to search, reference, and archive documents in SharePoint without leaving whatever business application they work in.

It also integrates with M365 applications to enable direct uploading of documents to SharePoint without extra clicks or opening browsers.

On the backend, KnowledgeLake streamlines workflows by supporting functions such as search, indexing, viewing and editing of documents.

AMSURG deployed KnowledgeLake in two phases. The first focused on archiving large volumes of existing paper documents generated by the accounting department.

The second phase involved loading digitized versions of journal entry backup instantly into SharePoint, where they are accessible to AMSURG employees regardless of their location.

## **BENEFITS**

KnowledgeLake has helped AMSURG improve productivity by streamlining key accounting processes.

### **Greater Productivity**

“KnowledgeLake helped us replace the inefficient process of printing and storing documents in boxes with a dramatically streamlined digital workflow,” says Cross.

“Closing the books on our centers requires a lot of supporting documentation and effort. Moving to KnowledgeLake has allowed our accounting staff to find the documents much more easily and quickly.”

“*The time savings that accrue by eliminating cumbersome manual searches can be put towards more productive activities, which will help us recover our initial costs for the system.*”

– Corey Cross, Senior Network Administrator

Cross also credits KnowledgeLake with streamlining the document upload process. “Our accountants can key in information from inside the accounting software they’re already working in, instead of moving back and forth into a secondary system,” Cross says. “That eliminates the inefficiency of cutting and pasting information along with the potential for human error.”

#### **Simplified Document Retrieval**

“Obtaining stored journal documents could be a very frustrating process in the past, consuming hours or days of valuable time,” Cross says. “With KnowledgeLake, it literally takes a matter of seconds to find and open a stored document.”

He says the reduced time needed for document retrieval means employees can spend time on more valuable tasks. “We now have about 100 users accessing KnowledgeLake,” Cross says. “The time savings that accrue by eliminating cumbersome manual searches can be put towards more productive activities.”

#### **Easy Integration with Existing Systems**

KnowledgeLake’s tight integration with SharePoint also made deployment relatively easy for the IT department.

“We use SmartStream software in our accounting department, and the integration with KnowledgeLake was incredibly simple,” Cross says. “It took me about 15 minutes using the wizards. It was great because we didn’t have to engage some third party and incur extra expense. KnowledgeLake makes it easy to integrate their products into existing enterprise systems.”



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